# CAREER & TECHNOLOGY STUDIES

# MANAGEMENT AND MARKETING

## GUIDE TO STANDARDS AND IMPLEMENTATION

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Program/Level: Career and Technology Studies/Secondary

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This document supersedes all previous versions of the *Career & Technology Studies Guide to Standards and Implementation.*

This publication is a support document. The advice and direction offered is suggestive except where it duplicates the Program of Studies. The Program of Studies—a prescriptive description of the expectations of student learning, focusing on what students are expected to know and be able to do—is issued under the authority of the Minister of Education pursuant to section 25(1) of the *School Act*, Statutes of Alberta, 1988, Chapter S–3.1 as amended, and is required for implementation. **Within this document, the Program of Studies is shaded so that the reader may readily identify all prescriptive statements or segments.**

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# CAREER AND TECHNOLOGY STUDIES

## A. PROGRAM RATIONALE AND PHILOSOPHY

Through Career and Technology Studies (CTS), secondary education in Alberta is responding to the many challenges of modern society, helping young people develop daily living skills and nurturing a flexible, well-qualified work force.

In Canada's information society, characterized by rapid change in the social and economic environment, students must be confident in their ability to respond to change and successfully meet the challenges they face in their own personal and work lives. In particular, they make decisions about what they will do when they finish high school. Many students will enter the work force, others will continue their education. All students face the challenges of growing independence and responsibility, and of entering post-secondary programs and/or the highly competitive workplace.

Secondary schools also face challenges. They must deliver, on a consistent basis, high quality, cost-effective programs that students, parents and the community find credible and relevant.

CTS helps schools and students meet these challenges. Schools can respond more efficiently and effectively to student and community needs and expectations by taking advantage of the opportunities in the CTS curriculum to design courses and access school, community and distance learning resources. Students can develop the confidence they need as they move into adult roles by assuming increased responsibility for their learning; cultivating their individual talents, interests and abilities; and by defining and acting on their goals.

As an important component of education in Alberta secondary schools, CTS promotes student achievement by setting clear expectations and recognizing student success. Students in CTS develop competencies—the knowledge, skills and attitudes they are expected to demonstrate, that is, what they know and what they are able to do.

Acquired competencies can be applied now and in the future as students make a smooth transition into adult roles in the family, community, workplace and/or further education. To facilitate this transition, clearly stated expectations and standards have been defined in cooperation with teachers, business and industry representatives and post-secondary educators.

CTS offers all students important learning opportunities. Regardless of the particular area of study chosen, *students* in CTS *will*:

- develop skills that can be applied in their daily lives, now and in the future
- refine career-planning skills
- develop technology-related skills
- enhance employability skills
- apply and reinforce learnings developed in other subject areas.


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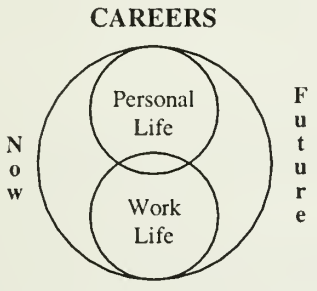
In CTS, students build skills they can apply in their everyday lives. For example, in the CTS program, particularly at the introductory levels, students have the opportunity to improve their ability to make sound consumer decisions and to appreciate environmental and safety precautions.

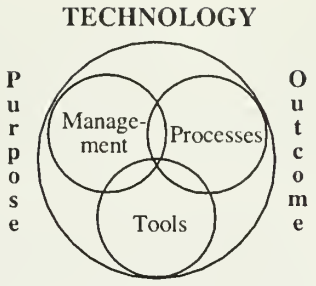



A career encompasses more than activities just related to a person's job or occupation; it involves one's personal life in both local and global contexts; e.g., as a family member, a friend, a community volunteer, a citizen of the world.

The integration of careers throughout the CTS program helps students to make effective career decisions and to target their efforts. CTS students will have the opportunity to expand their knowledge about careers, occupations and job opportunities, as well as the education and/or training requirements involved. Also, students come to recognize the need for lifelong learning.

Students in CTS have the opportunity to use and apply technology and systems effectively and efficiently. This involves:

- a decision regarding which processes and procedures best suit the task at hand
- the appropriate selection and skilled use of the tools and/or resources available
- an assessment of and management of the impact the use of the technology may have on themselves, on others and on the environment.




Integrated throughout CTS are employability skills, those basic competencies that help students develop their personal management and social skills. Personal management skills are improved as students take increased responsibility for their learning, design innovative solutions to problems and challenges, and manage resources effectively and efficiently. Social skills improve through learning experiences that require students to work effectively with others, demonstrate teamwork and leadership, and maintain high standards in safety and accountability.

As well as honing employability skills, CTS reinforces and enhances learnings developed in core and other optional courses. The curriculum emphasizes, as appropriate, the effective application of communication and numeracy skills.

In addition to the common outcomes described above, students focusing on a particular area of study will develop career-specific competencies that support entry into the workplace and/or related post-secondary programs. Career-specific competencies can involve understanding and applying appropriate terminology, processes and technologies related to a specific career, occupation or job.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## PROGRAM OUTCOMES

The program outcomes describe the basic competencies integrated throughout the CTS program.

Within an applied context relevant to personal goals, aptitudes and abilities; *the student* in CTS *will*:

- demonstrate the basic knowledge, skills and attitudes necessary for achievement and fulfillment in personal life
- develop an action plan that relates personal interests, abilities and aptitudes to career opportunities and requirements
- use technology effectively to link and apply appropriate tools, management and processes to produce a desired outcome
- develop basic competencies (employability skills), by:
  - selecting relevant, goal-related activities, ranking them in order of importance, allocating necessary time, and preparing and following schedules (managing learning)
  - linking theory and practice, using resources, tools, technology and processes responsibly and efficiently (managing resources)
  - applying effective and innovative decision-making and problem-solving strategies in the design, production, marketing and consumption of goods and services (problem solving and innovation)
  - demonstrating appropriate written and verbal skills, such as composition, summarization and presentation (communicating effectively)
  - participating as a team member by working cooperatively with others and contributing to the group with ideas, suggestions and effort (working with others)
  - maintaining high standards of ethics, diligence, attendance and punctuality, following safe procedures consistently, and recognizing and eliminating potential hazards (demonstrating responsibility).

## PROGRAM ORGANIZATION

### CURRICULUM STRUCTURE

Career and Technology Studies is organized into **strands** and **courses**.

**Strands** in CTS define competencies that help students:

- build daily living skills
- investigate career options
- use technology (managing, processes, tools) effectively and efficiently
- prepare for entry into the workplace and/or related post-secondary programs.

In general, strands relate to selected industry sectors offering positive occupational opportunities for students. Some occupational opportunities require further education after high school, and some allow direct entry into the workplace. Industry sectors encompass goods-producing industries, such as agriculture, manufacturing and construction; and service-producing industries, such as business, health, finance and insurance.

**Courses** are the building blocks for each strand. They define what a student is expected to know and be able to do (exit-level *competencies*). Courses also specify prerequisites. Recommendations for course parameters, such as instructional qualifications, facilities and equipment can be found in the guides to implementation.

The competencies a student must demonstrate to achieve success in a course are defined through *general outcomes*. Senior high school students who can demonstrate the general outcomes defined for a CTS course; i.e., who have the designated competencies, will qualify for 1 credit toward their high school diploma.


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*Specific outcomes* provide a more detailed framework for instruction. Within the context of the general outcomes, the specific outcomes further define the knowledge, skills and attitudes the student should acquire.

The following chart shows the 22 strands that comprise the CTS program and the number of 1-credit courses available in each strand.

| Strand | No. of Courses |
|---|---|
| 1. Agriculture | 33 |
| 2. Career Transitions | 31 |
| 3. Communication Technology | 33 |
| 4. Community Health | 31 |
| 5. Construction Technologies | 46 |
| 6. Cosmetology Studies | 58 |
| 7. Design Studies | 31 |
| 8. Electro-Technologies | 37 |
| 9. Energy and Mines | 26 |
| 10. Enterprise and Innovation | 8 |
| 11. Fabrication Studies | 41 |
| 12. Fashion Studies | 29 |
| 13. Financial Management | 14 |
| 14. Foods | 37 |
| 15. Forestry | 21 |
| 16. Information Processing | 48 |
| 17. Legal Studies | 13 |
| 18. Logistics | 12 |
| 19. Management and Marketing | 20 |
| 20. Mechanics | 54 |
| 21. Tourism Studies | 24 |
| 22. Wildlife | 17 |

## LEVELS OF ACHIEVEMENT

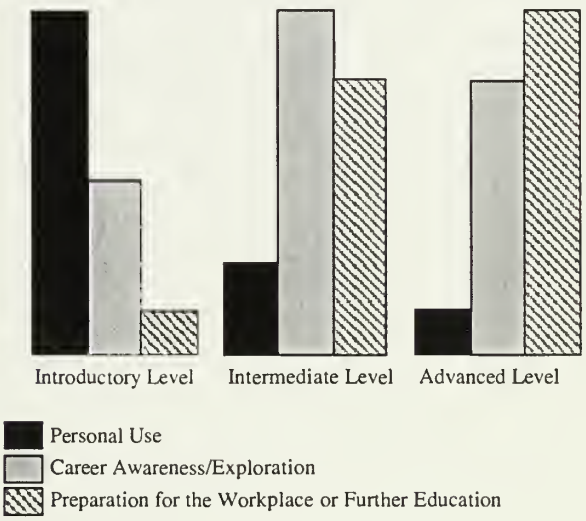
Courses are organized into three levels of achievement: **introductory**, **intermediate** and **advanced**. As students progress through the levels, they will be expected to meet higher standards and demonstrate an increased degree of competence, in both the program outcomes and the general outcomes defined for individual courses.

**Introductory** level courses help students build daily living skills and form the basis for further learning. Introductory courses are for students who have no previous experience in the strand.

**Intermediate** level courses build on the competencies developed at the introductory level. They provide a broader perspective, helping students recognize the wide range of related career opportunities available within the strand.

**Advanced** level courses refine expertise and help prepare students for entry into the workplace or a related post-secondary program.

The graph below illustrates the relative emphasis on the aspects of career planning at each of the levels.





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## CURRICULUM AND ASSESSMENT STANDARDS

**Curriculum standards** in CTS define what students must know and be able to do. Curriculum standards are expressed through the program outcomes for CTS, and through general and specific outcomes defined for individual courses within each strand.

**Assessment standards** define how student performance is to be judged. In CTS, each assessment standard defines the conditions and criteria to be used for assessing the competencies associated with each general outcome. To receive credit for a course, students must demonstrate competency at the level specified by the conditions and criteria defined for each general outcome.

Students throughout the province receive a fair and reliable assessment as they use the standards to guide their efforts, thus ensuring they participate more effectively and successfully in the learning and assessment process. Standards at advanced levels are, as much as possible, linked to workplace and post-secondary entry-level requirements.

## TYPES OF COMPETENCIES

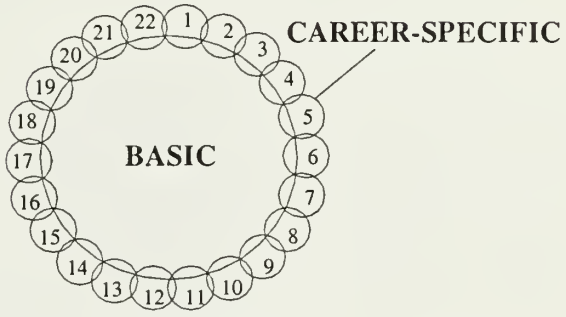
Two types of competencies are defined within the CTS program: basic and career-specific.

**Basic** competencies are generic to any career area and are developed within each course. Basic competencies include:

- personal management; e.g., managing learning, being innovative, ethics, managing resources
- social; e.g., communication, teamwork, leadership and service, demonstrating responsibility (safety and accountability).

**Career-specific** competencies relate to a particular strand. These competencies build daily living skills at the introductory levels and support the smooth transition to the workplace and/or post-secondary programs at the intermediate and advanced levels.

The model below shows the relationship of the two types of competencies within the 22 strands of the CTS program.





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## BASIC COMPETENCIES REFERENCE GUIDE

The chart below outlines basic competencies that students endeavour to develop and enhance in each of the CTS strands and courses. Students' basic competencies should be assessed through observations involving the student, teacher(s), peers and others as they complete the requirements for each course. In general, there is a progression of task complexity and student initiative as outlined in the Developmental Framework★. **As students progress through Stages 1, 2, 3 and 4 of this reference guide, they build on the competencies gained in earlier stages.** Students leaving high school should set themselves a goal of being able to demonstrate Stage 3 performance.

*Suggested strategies for classroom use include:*

- having students rate themselves and each other
- using in reflective conversation between teacher and student
- highlighting areas of strength
- tracking growth in various CTS strands
- highlighting areas upon which to focus
- maintaining a student portfolio.

| **Stage 1**— *The student:* | **Stage 2**— *The student:* | **Stage 3**— *The student:* | **Stage 4**— *The student:* |
|---|---|---|---|
| **Managing Learning** | | | |
| ☐ comes to class prepared for learning | ☐ → | ☐ → | ☐ → |
| ☐ follows basic instructions, as directed | ☐ follows instructions, with limited direction | ☐ follows detailed instructions on an independent basis | ☐ → |
| | ☐ sets goals and establishes steps to achieve them, with direction | ☐ sets clear goals and establishes steps to achieve them | ☐ demonstrates self-direction in learning, goal setting and goal achievement |
| ☐ acquires specialized knowledge, skills and attitudes | ☐ applies specialized knowledge, skills and attitudes in practical situations | ☐ transfers and applies specialized knowledge, skills and attitudes in a variety of situations | ☐ transfers and applies learning in new situations; demonstrates commitment to lifelong learning |
| ☐ identifies criteria for evaluating choices and making decisions | ☐ identifies and applies a range of effective strategies for solving problems and making decisions | ☐ uses a range of critical thinking skills to evaluate situations, solve problems and make decisions | ☐ thinks critically and acts logically to evaluate situations, solve problems and make decisions |
| ☐ uses a variety of learning strategies | ☐ explores and uses a variety of learning strategies, with limited direction | ☐ selects and uses effective learning strategies | ☐ → |
| | | ☐ cooperates with others in the effective use of learning strategies | ☐ provides leadership in the effective use of learning strategies |
| **Managing Resources** | | | |
| ☐ adheres to established timelines; uses time/schedules/planners effectively | ☐ creates and adheres to timelines, with limited direction; uses time/schedules/planners effectively | ☐ creates and adheres to detailed timelines on an independent basis; prioritizes task; uses time/schedules/planners effectively | ☐ creates and adheres to detailed timelines; uses time/schedules/planners effectively; prioritizes tasks on a consistent basis |
| ☐ uses information (material and human resources), as directed | ☐ accesses and uses a range of relevant information (material and human resources), with limited direction | ☐ accesses a range of information (material and human resources), and recognizes when additional resources are required | ☐ uses a wide range of information (material and human resources) in order to support and enhance the basic requirement |
| ☐ uses technology (facilities, equipment, supplies), as directed, to perform a task or provide a service | ☐ uses technology (facilities, equipment, supplies), as appropriate, to perform a task or provide a service, with minimal assistance and supervision | ☐ selects and uses appropriate technology (facilities, equipment, supplies) to perform a task or provide a service on an independent basis | ☐ recognizes the monetary and intrinsic value of managing technology (facilities, equipment, supplies) |
| ☐ maintains, stores and/or disposes of equipment and materials, as directed | ☐ maintains, stores and/or disposes of equipment and materials, with limited assistance | ☐ maintains, stores and/or disposes of equipment and materials on an independent basis | ☐ demonstrates effective techniques for managing facilities, equipment and supplies |
| **Problem Solving and Innovation** | | | |
| ☐ participates in problem solving as a process | ☐ identifies the problem and selects an appropriate problem-solving approach, responding appropriately to specified goals and constraints | ☐ thinks critically and acts logically in the context of problem solving | ☐ identifies and resolves problems efficiently and effectively |
| ☐ learns a range of problem-solving skills and approaches | | | |
| ☐ practices problem-solving skills by responding appropriately to a clearly defined problem, specified goals and constraints, by:<br>– generating alternatives<br>– evaluating alternatives<br>– selecting appropriate alternative(s)<br>– taking action | ☐ applies problem-solving skills to a directed or a self-directed activity, by:<br>– generating alternatives<br>– evaluating alternatives<br>– selecting appropriate alternative(s)<br>– taking action | ☐ transfers problem-solving skills to real-life situations, by generating new possibilities<br>☐ prepares implementation plans<br>☐ recognizes risks | ☐ identifies and suggests new ideas to get the job done creatively, by:<br>– combining ideas or information in new ways<br>– making connections among seemingly unrelated ideas<br>– seeking out opportunities in an active manner |


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| Stage 1— *The student:* | Stage 2— *The student:* | Stage 3— *The student:* | Stage 4— *The student:* |
|---|---|---|---|
| **Communicating Effectively** | | | |
| ☐ uses communication skills; e.g., reading, writing, illustrating, speaking | ☐ communicates thoughts, feelings and ideas to justify or challenge a position, using written, oral and/or visual means | ☐ prepares and effectively presents accurate, concise, written, visual and/or oral reports providing reasoned arguments | ☐ negotiates effectively, by working toward an agreement that may involve exchanging specific resources or resolving divergent interests |
| ☐ uses language in appropriate context | ☐ uses technical language appropriately | ☐ encourages, persuades, convinces or otherwise motivates individuals | ☐ negotiates and works toward a consensus |
| ☐ listens to understand and learn | ☐ listens and responds to understand and learn | ☐ listens and responds to understand, learn and teach | ☐ listens and responds to understand, learn, teach and evaluate |
| ☐ demonstrates positive interpersonal skills in selected contexts | ☐ demonstrates positive interpersonal skills in many contexts | ☐ demonstrates positive interpersonal skills in most contexts | ☐ promotes positive interpersonal skills among others |
| **Working with Others** | | | |
| ☐ fulfills responsibility in a group project | ☐ → | ☐ seeks a team approach, as appropriate, based on group needs and benefits; e.g., idea potential, variety of strengths, sharing of workload | ☐ leads, where appropriate, mobilizing the group for high performance |
| ☐ works collaboratively in structured situations with peer members | ☐ cooperates to achieve group results | ☐ works in a team or group:<br>– encourages and supports team members<br>– helps others in a positive manner<br>– provides leadership/ followership as required<br>– negotiates and works toward consensus as required | ☐ understands and works within the context of the group |
| ☐ acknowledges the opinions and contributions of others in the group | ☐ maintains a balance between speaking, listening and responding in group discussions<br>☐ respects the feelings and views of others | | ☐ prepares, validates and implements plans that reveal new possibilities |
| **Demonstrating Responsibility** | | | |
| **Attendance** | | | |
| ☐ demonstrates responsibility in attendance, punctuality and task completion | ☐ → | ☐ → | ☐ → |
| **Safety** | | | |
| ☐ follows personal and environmental health and safety procedures | ☐ recognizes and follows personal and environmental health and safety procedures | ☐ establishes and follows personal and environmental health and safety procedures | ☐ transfers and applies personal and environmental health and safety procedures to a variety of environments and situations |
| ☐ identifies immediate hazards and their impact on self, others and the environment | ☐ identifies immediate and potential hazards and their impact on self, others and the environment | ☐ → | ☐ → |
| ☐ follows appropriate/emergency response procedures | ☐ → | ☐ → | ☐ → |
| | | | ☐ demonstrates accountability for actions taken to address immediate and potential hazards |
| **Ethics** | | | |
| ☐ makes personal judgements about whether or not certain behaviours/actions are right or wrong | ☐ assesses how personal judgements affect other peer members and/or family; e.g., home and school | ☐ assesses the implications of personal/group actions within the broader community; e.g., workplace | ☐ analyzes the implications of personal/group actions within the global context<br>☐ states and defends a personal code of ethics as required |
| ★**Developmental Framework**<br>• *Simple task*<br>• *Structured environment*<br>• *Directed learning* | • *Task with limited variables*<br>• *Less structured environment*<br>• *Limited direction* | • *Task with multiple variables*<br>• *Flexible environment*<br>• *Self-directed learning, seeking assistance as required* | • *Complex task*<br>• *Open environment*<br>• *Self-directed/self-motivated* |


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# MANAGEMENT AND MARKETING

## B. STRAND RATIONALE AND PHILOSOPHY

In our highly competitive, rapidly changing society, management and marketing are generic skills. No matter what you do, how you manage yourself or how you use the resources available to you; you market yourself, your services or the products you make.

Management and Marketing, a strand in Career and Technology Studies, is designed to increase students' abilities to apply effective and efficient systems and strategies of management and marketing within personal, family, workplace, community and global contexts. The management aspect of this strand identifies effective procedures for organizing resources and working with people; whereas, marketing is concerned with pricing, promotion and distribution of ideas, products and services to satisfy consumer needs and wants.

Marketing in this strand takes a retail perspective. Linking student experiences as consumers to marketing in the retail marketplace is a central focus in the marketing systems and strategies theme. Through consumer experiences and other business-like activities, students will be asked to focus on marketing through the eyes of a retail worker, manager or owner. Students will learn retail merchandising strategies that help people engaged in marketing meet the challenge of ensuring that the right goods or services are in the right place, at the right time, in the right quantity, at the right price and offered to the right people.

Management in this strand emphasizes business and information management to generate profit within a competitive environment. Knowledge, skills and attitudes will be developed to help students identify and analyze strategies to succeed when working within continuously changing systems. Students will gain experience and confidence through a wide range of practical experiences as they plan, organize, take action, lead, work cooperatively, monitor progress and communicate. Their goal will be to ensure quality and professional service.

This strand provides an opportunity for students to explore the very complex and continuously expanding study of management and marketing systems and strategies. The intent is to help students develop enough background and skills so that, as entry-level employees, they can make an effective contribution right away. Many of the systems and strategies introduced here lead to further learning and specialization, both through workplace experiences and/or post-secondary study.

Management and Marketing builds on the Enterprise and Innovation strand competencies. Learning experiences will help students relate


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what they already know about how organizations run, how goods are sold and how the economy works. Management and Marketing can help students become aware of and assess a wide range of career opportunities—opportunities in small, medium and large public or private organizations as management and marketing specialists, in related support positions, or as a complement to the technical skills required by people who own and manage their own businesses.

Within the philosophy of Career and Technology Studies, *students* in Management and Marketing *will*:

- identify, analyze, apply and improve systems and strategies related to business and information management and marketing that can be applied personally, throughout CTS and in other study areas
- develop abilities in planning, organizing, leading, monitoring and communicating
- research, analyze, interpret and evaluate information needed in business management, marketing and information management systems and strategies
- develop and apply creative problem-solving and effective decision-making skills within the contexts of business management, marketing and information management systems and strategies
- analyze the role of the individual, family and community as they relate to management and marketing within the Canadian and global economy
- identify areas of interest and talent and relate these to career opportunities in business management and marketing
- demonstrate effort to develop basic competencies.


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# STRAND ORGANIZATION

The Management and Marketing curriculum development model, shown below, illustrates the linkages among the themes, integrating concepts and learning contexts.

## THEMES

Management and Marketing has three major themes around which the curriculum has been developed. All involve identifying, assessing and improving systems and strategies that affect:

- business management
- marketing
- information management.

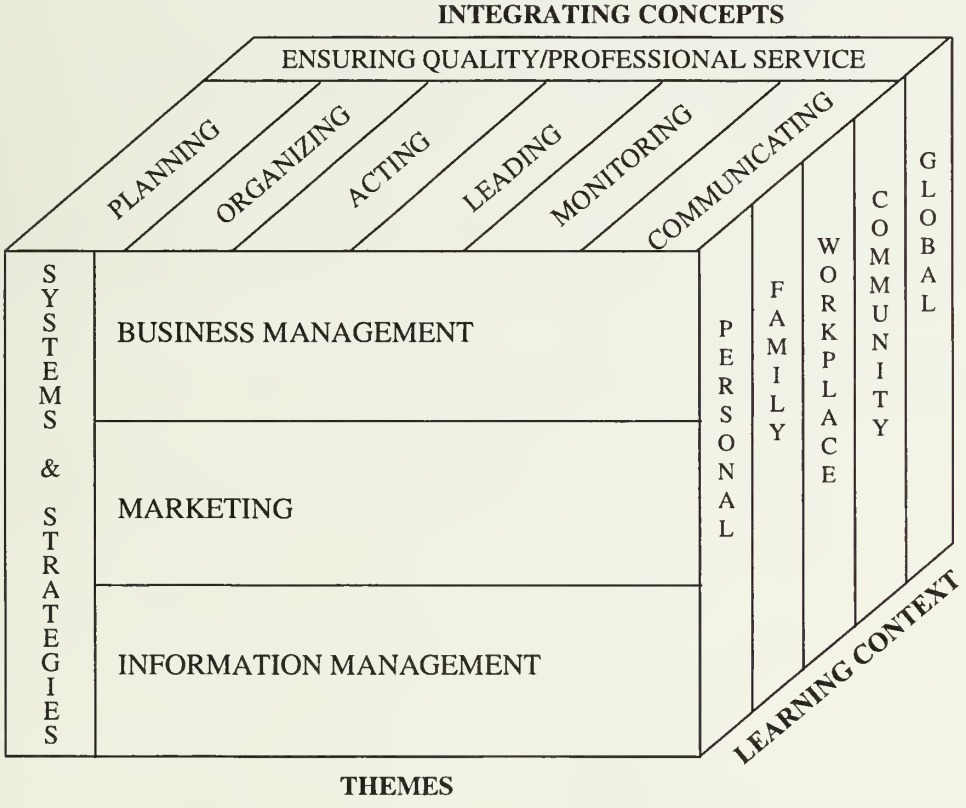
Career exploration is reinforced throughout all themes. Students identify personal interests and opportunities as they relate to careers in specific management and marketing areas.

## INTEGRATING CONCEPTS

Integrating concepts are competencies that are reinforced throughout the modules. A continuing emphasis is placed on applying principles of quality management and high standards of professional service. Students are encouraged to develop their ability to plan, organize, take action, lead, work cooperatively, monitor, make adjustments and communicate effectively.

## LEARNING CONTEXTS

Learning contexts provide a perspective for student learning. Using personal experience as the foundation, students relate what they are learning to family, workplace, community and global experiences and perspectives.





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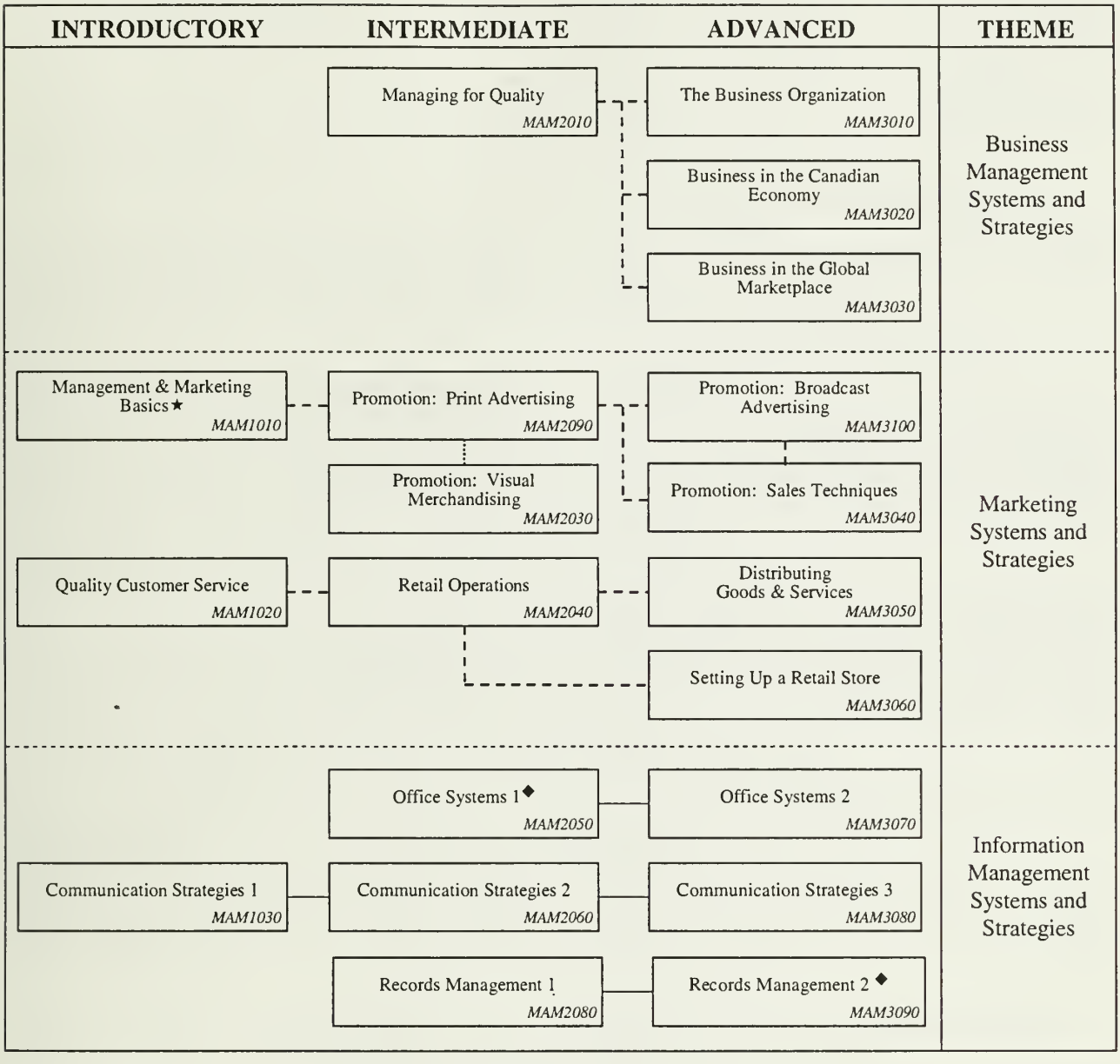


——— Prerequisite - - - - Recommended sequence

★ Course provides a strong foundation for further learning in this strand.

◆ Refer to specific courses for additional prerequisites.


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## COURSE DESCRIPTIONS

**Course MAM1010: Management & Marketing Basics**
Students identify basic management and marketing concepts, and describe retail merchandising strategies of value to the retail employee, manager or owner.

**Course MAM1020: Quality Customer Service**
Students identify and describe the target customer and the selling floor, including sales and nonsales activities.

**Course MAM1030: Communication Strategies 1**
Students improve oral and written business communications skills necessary for efficient and effective management of information. The focus is on business writing strategies and composing at the computer when preparing memorandums, e-mail messages and business letters.

**Course MAM2010: Managing for Quality**
Students demonstrate basic managerial skills, by assuming roles and responsibilities of management to coordinate available resources to achieve quality results.

**Course MAM2030: Promotion: Visual Merchandising**
Students identify different types of visual merchandising, and describe how to construct attention-getting displays and how to evaluate visual merchandising.

**Course MAM2040: Retail Operations**
Students identify retail operations that are typically performed off the selling floor, away from customers.

**Course MAM2050: Office Systems 1**
Students identify and describe strategies and procedures in the office environment and managing processes and protocols related to electronic equipment, written communication transmittal and business travelling arrangements.

**Course MAM2060: Communication Strategies 2**
Students improve their basic oral and written communication strategies necessary to efficient and effective management of information. The focus is on technical writing strategies and composing at the computer when preparing informal business reports and proposals.

**Course MAM2080: Records Management 1**
Students demonstrate basic records management skills for a manual records system, emphasizing alphabetic coding procedures.

**Course MAM2090: Promotion: Print Advertising**
Students are introduced to communication channels, delivery strategies and advertising media that can be used to inform potential customers about products and services available in the marketplace.

**Course MAM3010: The Business Organization**
Students identify and describe organizational structures, management theories and organizations as working units. Students also explain their beliefs of what successful organizations might look like in the future.

**Course MAM3020: Business in the Canadian Economy**
Students expand and relate their knowledge of economics to how business decisions are made within the community, the province, nationally and internationally.

**Course MAM3030: Business in the Global Marketplace**
Students identify the opportunities and challenges that confront business people in establishing a global business operation.

**Course MAM3040: Promotion: Sales Techniques**
Students learn techniques for successful selling.

**Course MAM3050: Distributing Goods & Services**
Students explore the channels of distribution and modes of transportation used to direct goods from the producer to the consumer.


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**Course MAM3060: Setting Up a Retail Store**
Students develop retail store images, examine potential locations and design store layouts. Students should be given hands-on experience by researching a location for an actual retailing opportunity and design a layout for this retail store. This course focuses on students owning a retail business and learning the necessary steps for success.

**Course MAM3070: Office Systems 2**
Students demonstrate effective office environment strategies and processes, use electronic office equipment, and manage processes related to electronic communications and business meetings.

**Course MAM3080: Communication Strategies 3**
Students continue to improve basic oral and written communications strategies necessary to efficient and effective management of information. Focus is on technical writing strategies and composing at the computer when preparing formal business reports and proposals.

**Course MAM3090: Records Management 2**
Students describe the advantages of an automated records system. Numeric, subject and geographic coding are emphasized.

**Course MAM3100: Promotion: Broadcast Advertising**
Students are introduced to broadcast communication channels, delivery strategies and advertising media that can be used to inform potential customers about products and services available in the marketplace.


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# SECTION C: PLANNING FOR INSTRUCTION

CTS provides increased opportunity for junior and senior high schools to design courses based on the needs and interests of their students and the circumstances within the school and community. Some strands may be appropriately introduced at the junior high school level. Other strands are more appropriately introduced at the senior high school level or to Grade 9 students. Refer to this section for recommendations regarding the Management and Marketing strand.

## PLANNING FOR CTS

### Defining Courses

Schools determine which strands and courses will be offered in a particular school, and will combine 1-credit CTS courses into multiple-credit CTS offerings.

Each 1-credit course was designed for approximately 25 hours of instruction. However, this time frame is only a guideline to facilitate planning. The CTS curricula are competency based, and the student may take more or less time to gain the designated competencies within each course.

A multiple-credit CTS offering will usually consist of 1-credit courses primarily from the same strand but, where appropriate, may include courses from other CTS strands. Refer to the *Guide to Education: ECS to Grade 12* (Appendix 1) for more information on course names and course codes.

Course selection and sequencing should consider:

- prerequisite(s)
- supporting course(s) (other CTS courses that may enhance the learning opportunity if offered with the course)
- course parameters
  - instructional qualifications, if specialized
  - equipment and facility requirements, if specialized.

The course parameters are defined in Sections D, E and F of this Guide.

### Degree of Flexibility

The CTS program, while designed using the modular structure to facilitate flexible timetabling and instructional delivery, does not mandate the degree of flexibility a school or teacher will offer. The teacher and school will determine the degree of flexibility available to the student. Within the instructional plan established by the school, the student may:

- be given the opportunity to progress at a rate that is personally challenging
- have increased opportunity to select courses that develop competencies he or she finds most relevant.

### Integrating Basic Competencies

The basic competencies relate to managing learning and resources, problem solving and innovation, communicating effectively, working with others and demonstrating responsibility are developed throughout the CTS program, and within each 1-credit course.

Assessment of student achievement on the basic competencies is integrated throughout the other general outcomes. Refer to Section G (Assessment Tools) of this Guide for the description of student behaviours expected at each of the four developmental stages defined for the basic competencies.

Assessment of basic competencies could include input and reflection involving the student, teacher(s), peers and others. Description of the observed behaviour could be provided through a competency profile for the course. Positive, ongoing interaction between the student and teacher will support motivation for student growth and improvement.


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### Assessing Student Achievement

Assessing student achievement is a process of gathering information by way of observations of process, product and student interaction.

Where appropriate, assessment tools have been defined to assist the teacher and student in the assessment. Refer to Section G (Assessment Tools) of this Guide for copies of various tools (worksheets, checklists, sample questions, etc.).

A suggested emphasis for each general outcome has also been established. The suggested emphasis provides a guideline to help teachers determine time allocation and/or the appropriate emphasis for each general outcome and the student grade.

### Recognizing Student Achievement

At the high school level, successful demonstration of the exit-level competencies in a course qualifies the student for one credit. Refer to Section A of this Guide for more detailed information about how curriculum and assessment standards are defined in CTS. Refer to the *Career & Technology Studies Manual for Administrators, Counsellors and Teachers* for more information on how student achievement can be recognized and reported at the school and provincial levels.

### Portfolios

When planning for instruction and assessment, consider a portfolio as an excellent tool to provide evidence of a student's effort, progress and achievement. Portfolios will aid students in identifying skills and interest. They also provide the receiving teacher, employer and/or post-secondary institution proof of a student's accomplishments. The make-up and evaluation of the portfolio should be a collaborative agreement between the student and teacher.

### Resources

A comprehensive resource base, including print, software and audio-visual, has been identified to support CTS strands. It is intended that these resources form the basis of a resource centre, encouraging teachers and students to access a wide selection of resources and other information sources throughout the learning process. Unless otherwise noted, these resources are considered to be suitable for both junior and senior high school students.

Refer to Section I (Learning Resource Guide) to obtain directions for accessing up-to-date information about learning resources that have been identified to support the delivery of CTS courses in this strand.

### Sample Student Learning Guides

In addition to the resources, Sample Student Learning Guides are available (refer to Section J of this Guide). These samples, designed for individual student or small group use, provide an instructional plan for selected courses and include the following components:

- Why take this course?
- What are the entry-level competencies?
- What are the exit-level competencies?
- What resources may be accessed?
- What assignments/activities must be completed?
- What are the timelines?
- How will the final mark be calculated?

## PLANNING FOR MANAGEMENT AND MARKETING

The following suggestions are provided to assist teachers, schools and school system administrators as they plan to deliver courses in the Management and Marketing strand.

### Selecting Courses

The scope and sequence chart in Section B provides an overview of the Management and Marketing courses, indicating prerequisites and theme areas. Brief descriptions of each of the courses follow the scope and sequence chart in Section B.


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### *Management and Marketing in Junior High*

Three introductory level courses may be offered at the junior high level: Management & Marketing Basics, Quality Customer Service and Communication Strategies 1. The number of courses will vary according to the time available throughout Grades 7, 8 and 9.

| Time Available | Courses |
|---|---|
| 25 hours | Management & Marketing Basics |
| 50 hours | Management & Marketing Basics<br>Quality Customer Service *or*<br>Communication Strategies 1 |
| 75–100 hours | add courses from other CTS strands (e.g., Enterprise and Innovation, Communication Technology, Information Processing, Legal Studies, Financial Management) |

Where appropriate, junior high school students may also take intermediate level courses.

### *Management and Marketing in Senior High*

Following are a few examples of course groupings into sample courses:

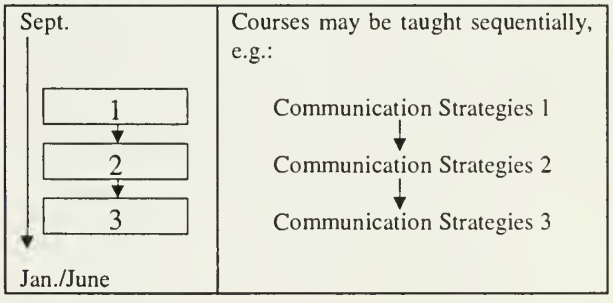
| | |
|---|---|
| 5–6 credits (no previous experience) (Business Management emphasis) | Management & Marketing Basics<br>Communication Strategies 1<br>Managing for Quality<br>The Business Organization<br>Business in the Canadian Economy<br>Business in the Global Marketplace |
| 5–6 credits (no previous experience) (Information Management Systems and Strategies) | Communication Strategies 1<br>Office Systems 1<br>Records Management 1<br>Communication Strategies 2<br>Office Systems 2<br>Records Management 2 |
| 5–6 credits (no previous experience) Marketing/Retailing emphasis) | Management & Marketing Basics<br>Quality Customer Service<br>Retail Operations<br>Promotion: Print Advertising<br>Promotion: Visual Merchandising<br>Promotion: Sales Techniques |
| 5–15 credits (foundation for entry into workplace in customer service) | Quality Customer Service<br>Retail Operations<br>Promotion: Visual Merchandising<br>and courses selected from other CTS strands (e.g., Foods, Tourism Studies, Logistics) |
| 5–15 credits (foundation for entry into workplace into administrative support positions) | Managing for Quality<br>Communication Strategies 1<br>Office Systems 1 and 2<br>Records Management 1 and 2<br>and courses selected from other CTS strands (e.g., Information Processing, Financial Management) |

Courses could also be clustered into multiple-credit offerings that emphasize a particular theme.

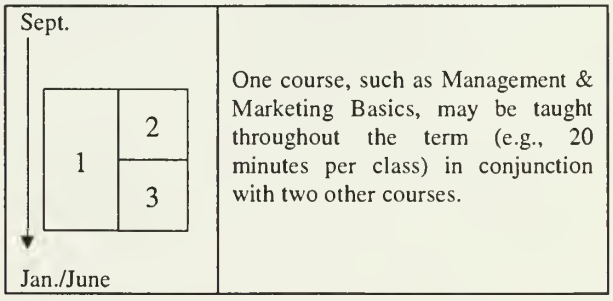
### Organizing for Learning

Before selecting courses, teachers should check the course parameters outlined in each module (see Sections D, E and F of this Guide).

*Scenario A*




*Scenario B*


Sept.
1
2
3
Jan./June
One course, such as Management & Marketing Basics, may be taught throughout the term (e.g., 20 minutes per class) in conjunction with two other courses.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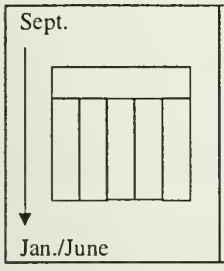
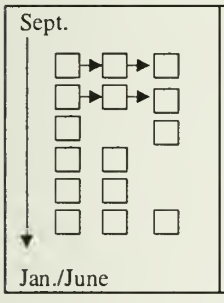
Teachers can also allow students to progress at a rate that is personally challenging; e.g.:

*Scenario C*




All students take one or two common courses together, then are able to select other courses from a menu of courses made available to them.

*Scenario D*




From a list of courses identified by the teacher, the students select which ones they will work on and, in consultation with the teacher, establish timelines for completion and submission of assignments, etc.

**Identifying Linkages**

Section H of this Guide describes some linkages that are possible within the Management and Marketing strand and:

- other CTS strands
- junior and senior high school math and science programs. Additional linkages with language arts and social studies and complementary programs will be defined over time.

***Special Relationship to Enterprise and Innovation***

The Management and Marketing strand expands and enhances competencies developed within the Enterprise and Innovation strand. For many students, courses will include both Enterprise and Innovation and Management and Marketing. The Extended Scope and Sequence in Section H shows how the two strands can be integrated.

Enterprise and Innovation courses focus on encouraging individuals to establish ventures (both profit and non-profit), providing students with a comprehensive understanding of how to start and manage a business and market a product or service. Management and Marketing provides more depth and specialization, emphasizing profit and competition within the Canadian and global economies. While Enterprise and Innovation emphasizes small business organizations, Management and Marketing includes large organizations, both private and public.

***Other Linkages within CTS***

Students will also find that selected courses from Management and Marketing complement their learnings from other CTS strands. For example, a student focusing on Mechanics who plans to own a garage would benefit from learning effective and efficient strategies to manage the shop and market the repair services. Students targeting any one of the Management and Marketing themes will benefit from courses from other CTS strands.

A sample of these combinations are provided in the table below.

| Management and Marketing Themes | Complementary Strand |
|---|---|
| Business Management Systems and Strategies | Enterprise and Innovation<br>Legal Studies<br>Financial Management<br>Information Processing |
| Marketing Systems and Strategies | Enterprise and Innovation<br>Communication Technology<br>Fashion Studies<br>Design Studies<br>Information Processing<br>Logistics<br>Tourism Studies |
| Information Management Systems and Strategies | Information Processing<br>Communication Technology |

Note that project courses from the Career Transitions strand may be combined with courses from other strands to provide increased opportunity for students to develop expertise and refine their competencies.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Project modules are **not** designed to be offered as distinct courses and should **not** be used to extend Work Experience 15, 25 and 35 courses.

**Improving Smooth Transition to the Workplace and/or Related Post-secondary Programs**

Section H of this Guide also provides potential transitions students may make:

- into the workplace
- into related post-secondary programs or other avenues for further learning.


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# MODULE CURRICULUM AND ASSESSMENT STANDARDS:
# SECTION D: INTRODUCTORY LEVEL

The following pages define the curriculum and assessment standards for the introductory level of Management and Marketing.

Introductory level modules help students build daily living skills and form the basis for further learning. Introductory modules are developed for students who have no previous experience in the strand.

Module learner expectations define the competencies a student must demonstrate to achieve success in a module. Assessment standards define the criteria and conditions to be used for assessing the competencies defined in the module learner expectations.

Specific learner expectations provide a detailed framework for instruction and help students build the competencies defined in the module learner expectations. Additional information and suggestions for instruction are provided in the Notes column; teachers may wish to use this space to record their ideas for instruction or student projects.


Module MAM1010: Management & Marketing Basics ..... D.3
Module MAM1020: Quality Customer Service ..... D.9
Module MAM1030: Communication Strategies 1 ..... D.15




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**COURSE MAM1010: MANAGEMENT & MARKETING BASICS**

**Level:** Introductory

**Theme:** Marketing Systems and Strategies

**Prerequisite:** None

**Description:** Students identify basic management and marketing concepts, and describe retail merchandising strategies of value to the retail employee, manager or owner.

**Parameters:** No specialized equipment or facilities.

**Curriculum and Assessment Standards**

| General Outcomes | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • relate management concepts to:<br>– his or her personal life<br>– organizations he or she is involved in<br>– different types of businesses (large and small) | • a personal management project consisting of how people use planning, organizing, leading and monitoring skills every day when striving to achieve success in:<br>– personal and family lives<br>– local organizations including schools<br>– local businesses.<br>*Assessment Tool*<br>*Presentations/Reports: Management and Marketing Projects (MAM1010–1)*<br>*Standard*<br>*Rating of 1 in each applicable task* | 20 |
| • describe the characteristics of marketing and decisions made within the marketing mix | • a marketing project consisting of selecting and/or making a product and/or a service and listing decisions that a manufacturer, wholesaler and/or retailer would make regarding product/service, price, promotion, place, consumer and competition.<br>*Assessment Tool*<br>*Presentations/Reports: Management and Marketing Projects (MAM1010–1)*<br>*Standard*<br>*Rating of 1 in each applicable task* | 30 |


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**COURSE MAM1010: MANAGEMENT & MARKETING BASICS** (continued)

| General Outcomes | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • describe the role of retailing:<br>– in Canadian history<br>– in Canada today<br>– in Canada in the future | • a written, oral and/or visual presentation consisting of:<br>– role of retailing in the marketplace<br>– evolution of retailing<br>– role of technology in retailing<br>– functions of retailing (buying, selling and merchandising).<br>*Assessment Tool*<br>*Presentations/Reports: Management and Marketing Projects (MAM1010–1)*<br>*Standard*<br>*Rating of 1in each applicable task* | 20 |
| • identify and analyze retail merchandising strategies used in the marketplace today | • a written, oral and/or visual presentation on merchandising strategies related to product, price, service, place and promotion.<br>*Assessment Tool*<br>*Presentations/Reports: Management and Marketing Projects (MAM1010–1)*<br>*Standard*<br>*Rating of 1 in each applicable task* | 20 |
| • identify management and marketing careers of personal interest | • a personal inventory of self to include:<br>– assessment of talents and interests<br>– exploration of management and marketing careers related to talents and interests<br>– identification of career interests.<br>*Assessment Tool*<br>*Assessment Task: Career Profiles (MAMCARE)*<br>*Standard*<br>*Three career profiles, all sections completed* | 10 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |


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| Concept | Specific Outcomes | Notes |
|---|---|---|
| Management Systems and Strategies | *The student should:*<br>• define and describe past and present experiences of management:<br>– personal management<br>– management at home<br>– management of the school<br>– management of organizations to which he or she belongs<br>• identify and describe the role of management in an organization: planning, organizing, leading, monitoring, communicating<br>• identify features of different forms of business ownership; e.g., sole proprietor, partnership, corporation, franchise, cooperative, conglomerate, multinational, crown corporation. | |
| Marketing Systems and Strategies | • describe his or her past or present marketing experiences<br>• identify the importance of marketing to a market economy<br>• analyze the relationship between satisfying consumers and making a profit<br>• identify the components of the "marketing mix" (four Ps and two Cs)<br>• research decisions made in each component of the marketing mix<br>• describe the focus marketing takes for different types of businesses:<br>– *manufacturers* – product and service development<br>– *wholesalers* – marketing products and services to retailers and other businesses<br>– *retailers* – marketing to end user (the ultimate consumer)<br>• describe the effect marketing decisions have on society (environmental concerns, cultural issues)<br>• differentiate between marketing and retail merchandising. | To production? to consumption?<br>Can you have one without the other?<br>Product, price, promotion, place, consumers, competition.<br>Compare these decisions to making a cake; e.g., what happens when one of the ingredients is missing? What happens when you change an ingredient, such as vanilla, to chocolate?<br>For example, reduce, reuse, recycling. |


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| Concept | Specific Outcomes | Notes |
|---|---|---|
| The Role of Retailing in Marketing | *The student should:*<br>• discuss the important role of retailing in Canada | Closest link is to the consumer. |
| | • describe the evolution of retailing in Canada | Historical perspective (e.g., bartering and the marketplace, impact of World War I, railway and automobiles, introduction of the supermarket). |
| | • analyze the role of technology in the evolution of retailing including:<br>– electronic banking (debit and credit cards)<br>– home shopping<br>– scanners/UPCs (Universal Product Codes)<br>– improved product quality<br>– just-in-time delivery | |
| | • identify and explain the three major functions of retailers:<br>– buying<br>– selling<br>– merchandising. | Merchandising is having the right goods, in the right quantity, at the right price, at the right time, in the right place and ensuring consumers know about it. |
| Retail Merchandising Strategies | • analyze and show examples of *product merchandising strategies* used to increase sales including:<br>– scrambled merchandising<br>– narrowing the product line<br>– sampling and product demonstrations<br>– shelf positioning (eye-level)<br>– packaging (name, colour, size, pictures)<br>– brand selection and identification | Scavenger hunt in a variety of retail stores could be used when exploring merchandising strategies.<br><br>National brands, house brands, no name. |
| | • analyze and show examples of *pricing merchandising strategies* used to increase sales including:<br>– multiple pricing<br>– unit pricing on shelves<br>– warehouse pricing<br>– loss leaders | Three for $1.00. |


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| Concept | Specific Outcomes | Notes |
|---|---|---|
| Retail Merchandising Strategies (continued) | *The student should:*<br>• analyze and show examples of *service merchandising strategies* used to increase sales including:<br>– hours of operation<br>– franchising—dependable, consistent<br>– loyalty programs; e.g., points for purchases<br>– delivery, gift wrapping, installation or repair<br>– satisfaction guaranteed<br>• analyze and show examples of *place merchandising strategies* used to increase sales including:<br>– size of store<br>– layout of store—commonly purchased items placed around the perimeter of the store<br>– use of direct lighting to enhance products<br>• analyze and show examples of *promotional merchandising strategies* used to increase sales including:<br>– visual merchandising—window displays, point of purchase displays (POP)<br>– posters and advertisements around the store that coordinate with promotional campaigns in the media<br>– shelf cards indicating specials<br>– packaging and labelling. | Big has lots to offer, small is specialized and knowledgeable.<br>For example, produce in a supermarket.<br>POP displays include end of counter, tumble (bins), multiple pricing, tie-in displays (related items).<br>Pictures and graphics on packaging, brand names. |
| Careers and Opportunities | • analyze a variety of careers available within the field of management and marketing<br>• identify careers of interest within the field of management and marketing. | Retailing, wholesaling, manufacturing, advertising, etc. |


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**MODULE MAM1020: QUALITY CUSTOMER SERVICE**

**Level:** Introductory

**Theme:** Marketing Systems and Strategies

**Prerequisite:** None

**Module Description:** Students identify and describe the target customer and the selling floor, including sales and nonsales activities.

**Module Parameters:** School store lab recommended, but not required.

**Supporting Module:** MAM1010 Management & Marketing Basics

**Curriculum and Assessment Standards**

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • identify and describe:<br>– how retailers target their markets<br>– a variety of consumer behaviours | • a customer portfolio consisting of:<br>– description of target markets including participants, demographics and psychographics for a product, retailer and service business<br>– analyze a minimum of five advertisements from a newspaper and/or magazine and indicate five different buying motives used.<br>– identify three recent purchases and indicate whether each<br>• was a want or need<br>• factors that influenced each purchase<br>– description of the AIDA concept and how it is used to influence purchases.<br>*Assessment Tool*<br>*Presentation/Reports: Customer Portfolio (MAM1020–1)*<br>*Standard*<br>*Rating of 1 in each applicable task* | 30 |
| • demonstrate effective retail sales/service techniques as:<br>– a retail sales clerk and/or service provider<br>– cashier | • an effective performance in a retail simulation or work situation consisting of both selling and non-selling activities.<br>*Assessment Tool*<br>*Assessment Guide: Retail Sales Clerk Techniques (MAM1020–2)*<br>*Cashier/Terminal Station (MAM1020–3)*<br>*Standard*<br>*Rating of 3 in each applicable task* | 60 |


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**MODULE MAM1020: QUALITY CUSTOMER SERVICE** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • identify personal interests and opportunities as they relate to careers in retailing | • a career profile that includes job descriptions, education/qualification requirements, employment opportunities, advancement potential and salary range.<br>*Assessment Tool*<br>*Assessment Task: Career Profiles (MAMCARE)*<br>*Standard*<br>*Three career profiles, all sections completed* | 10 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Knowing the Customer | *The student should:*<br>• describe target market<br>• identify and describe the components of a target market:<br>– participants—buyers, users, influencers<br>– demographics—age, sex, income, geographical location, education, ethnic origin, economic background<br>– psychographics—lifestyles including attitude, interests and habits<br>• identify target markets for a variety of products and/or services. | |


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| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| | *The student should:* | |
| Consumer Behaviours | • describe basic needs and identify several examples | |
| | • describe secondary "wants" and identify several examples | |
| | • differentiate among recent purchases and indicate if they were needs or wants | |
| • Buying Motives | • describe Maslow's hierarchy of needs and identify purchases made at each level | Self-fulfillment, esteem, belonging, safety, physical. |
| | • identify and give examples of:<br>– rational buying motives<br>– emotional buying motives | Quality, price, convenience.<br>Love, pride, fear. |
| | • identify your buying motives on recent purchases | |
| • Influences | • explain the influences of income on purchases | Disposable income, discretionary income. |
| | • describe how advertising influences consumer purchases | Persuasion, information. |
| | • describe the AIDA concept (**A**ttention, **I**nterest, **D**esire, **A**ction) and indicate its relationship to consumer behaviour | |
| | • identify influences on recent purchases. | |
| Quality Service<br>• Personal Characteristics | • demonstrate high standards of personal health, grooming and cleanliness | |
| | • demonstrate proper interaction and relationships with:<br>– customers<br>– co-workers<br>– supervisors<br>– suppliers | Dependable, loyal, collaborative, reliable. |


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| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| | *The student should:* | |
| • Role of Sales Clerk | • differentiate between the role of a sales clerk/service provider and a salesperson | Waiting on customers versus presenting to them. |
| | • describe or demonstrate how sales clerks obtain product knowledge | On-the-job training, other employees, manuals, sale reps, labels and packaging. |
| | • demonstrate quality customer service when:<br>– preparing sales receipts/bills<br>– dealing with various customer types<br>– handling customer complaints and returns | Committed, knowledgeable, just-looking, undecided, rushed, disagreeable, know-it-all. |
| | • demonstrate use of proper approach (greeting, service, merchandise) | |
| • Role of a Cashier | • demonstrate quality customer service skills as a cashier:<br>– identify and label various cash register/terminal parts and functions<br>– use float and cash draw organization<br>– operate cash register/terminal or cash box<br>– accept cheques and/or credit cards<br>– make change and count change back to customer<br>– wrap/bag merchandise<br>– take leave of customer<br>– close and cash out a cash register/terminal<br>– accurately complete cash reconciliation<br>– prepare a store deposit. | Use cash register manuals.<br><br>Use least amount of coins and bills possible. |
| Completing Non-selling Activities | • demonstrate the ability to follow store policies and procedures | For example, security, employee conduct. |
| | • demonstrate upkeep and maintenance of a store | Interior and exterior displays, floors, counters and shelves. |
| | • maintain well-stocked shelves | Rotation of stock. |
| | • assist in preparing promotional campaigns including visual merchandising. | Students help construct and maintain preplanned displays or help prepare promotional campaigns as a class project. |


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**MODULE MAM1020: QUALITY CUSTOMER SERVICE** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Career Exploration | *The student should:*<br>• analyze a variety of career opportunities in retailing<br>• identify personal interests, talents and experiences as they relate to careers in retailing. | Define key terms related to career path/ladders, entry-level positions, mid-management, management positions. |


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**MODULE MAM1030: COMMUNICATION STRATEGIES 1**

**Level:** Introductory

**Theme:** Information Management Systems and Strategies

**Prerequisite:** None

**Module Description:** Students improve oral and written business communication skills necessary for efficient and effective management of information. The focus is on business writing strategies and composing at the computer when preparing memorandums, e-mail messages and business letters.

**Module Parameters:** Access to a computer workstation.

**Supporting Modules:** INF1010 Computer Operations
INF1030 Word Processing 1

**Curriculum and Assessment Standards**

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • demonstrate use of the writing process when composing correspondence, including:<br>– prewriting<br>– writing<br>– revising<br>– proofreading | • a correspondence writing project consisting of planning, composing, revising and proofreading:<br>– a memorandum<br>– e-mail messages (send and reply)<br>– a personal business letter regarding a business matter (e.g., letter of complaint from a customer)<br>– a business letter regarding a particular business matter.<br>*Assessment Tool*<br>*Assessment Guide: Communication Strategies Writing Projects (MAMCOM–2)*<br>*Standard*<br>*Rating of 1 in each applicable task* | 70 |
| • demonstrate appropriate ways to deal with callers:<br>– face to face<br>– on the telephone | • a role-playing situation consisting of a minimum of two business communication scenarios; one for a face-to-face situation, the other for a telephone situation. Show evidence of proper etiquette when making introductions and using the telephone.<br>*Assessment Tool*<br>*Assessment Guide: Communication Strategies 1—Role Playing (MAM1030–1)*<br>*Standard*<br>*Rating of 1 in each applicable task* | 20 |


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**MODULE MAM1030: COMMUNICATION STRATEGIES 1** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • identify personal interests and opportunities as they relate to applying effective communication strategies in career areas | • a career profile that includes job descriptions, education/qualification requirements, employment opportunities, advancement potential and salary range.<br>*Assessment Tool*<br>*Assessment Task: Career Profiles (MAMCARE)*<br>*Standard*<br>*Three career profiles, all sections completed* | 10 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above.* | Integrated throughout |

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Planning to Write Business Documents | *The student should:*<br>• identify and describe the different types of business documents<br>– memoranda (memos)<br>– electronic messages (e-mails)<br>– personal business letters<br>– business letters<br>– informal business reports<br>– form business reports<br>– proposals and press releases<br>• outline and research the steps in the writing process: prewriting, composing, revising, proofreading<br>• describe strategies to use when planning to write business documents<br>– identify the main point<br>– identify the audience<br>– determine the type of document (letter, memo)<br>– plan the message by listing points<br>– arrange points in logical order | |


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**MODULE MAM1030: COMMUNICATION STRATEGIES 1** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Planning to Write Business Documents (continued) | *The student should:*<br>• describe basic sentence structure, grammar, spelling and punctuation rules. | |
| Writing Effective Memos | • identify and use *prewriting* strategies when preparing e-mail messages and memos:<br>– good organization<br>– get to the point quickly<br>– supply accurate information<br>– indicate specific actions<br>• select a format to use before writing a memo or e-mail message<br>• *compose* the first draft of the memo using a word processing program/template<br>• identify and use *revising* strategies (e.g., check for brevity, active language and clarity)<br>• identify and use *proofreading* strategies:<br>– proofread for facts, dates, names, figures and statistical information<br>– proofread for sentence structure, grammar, spelling, punctuation and format. | |
| Writing Effective Business Letters | • differentiate between a personal business letter and a business letter<br>• describe the functions of a business letter:<br>– sell products or services<br>– request material or information<br>– answer customer inquiries or complaints<br>– increase goodwill<br>– act as a permanent record<br>– written contract | |


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**MODULE MAM1030: COMMUNICATION STRATEGIES 1** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Writing Effective Business Letters (continued) | *The student should:*<br>• identify and use *prewriting* strategies when preparing personal business and business letters:<br>– identify the purpose and audience<br>– identify what details need to be included<br>– complete any necessary research<br>– organize the letter using letter formulas<br>– outline the details of the letter in the order they should appear<br>• select a letter format to use before writing<br>• *compose* the first draft of the letter—including an opening, body and closing—using a word processing program<br>• identify and use *revising* strategies for a business letter<br>• identify and use *proofreading* strategies:<br>– proofread for facts, dates, names, figures and statistical information<br>– proofread for sentence structure, grammar, spelling, punctuation and format. | For example, AIDA formula: attention interest, desire, action. |
| Effective Oral Communications in Business | • describe effective oral communication strategies used in business<br>• describe the significance of non-verbal language<br>• practise using proper telephone etiquette when making/answering calls, during the call and following the call<br>• practise making proper business introductions. | Opening, listening, responding.<br>Body language. |
| Career Exploration | • analyze a variety of career opportunities related to business communications<br>• identify personal interests, talents and experiences as they relate to careers in business communications. | Define key terms related to career path/ladders, entry-level positions, mid-management, management positions. |


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# COURSE CURRICULUM AND ASSESSMENT STANDARDS:
# SECTION E: INTERMEDIATE LEVEL

The following pages define the curriculum and assessment standards for the intermediate level of Management and Marketing.

Intermediate level courses help students build on the competencies developed at the introductory level and focus on developing more complex competencies. They provide a broader perspective, helping students recognize the wide range of related career opportunities available within the strand.


Course MAM2010: Managing for Quality ..... E.3
Course MAM2090: Promotion: Print Advertising ..... E.9
Course MAM2030: Promotion: Visual Merchandising ..... E.15
Course MAM2040: Retail Operations ..... E.21
Course MAM2050: Office Systems 1 ..... E.27
Course MAM2060: Communication Strategies 2 ..... E.31
Course MAM2080: Records Management 1 ..... E.35




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**MODULE MAM2010: MANAGING FOR QUALITY**

**Level:** Intermediate

**Theme:** Business Management Systems and Strategies

**Prerequisite:** None

**Module Description:** Students demonstrate basic managerial skills, by assuming roles and responsibilities of management to coordinate all available resources to achieve quality results.

**Module Parameters:** No specialized equipment or facilities.

**Supporting Module:** MAM1010 Management & Marketing Basics

**Curriculum and Assessment Standards**

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • identify and outline quality management systems and strategies used to improve quality | • a report or presentation consisting of:<br>– the role of customers, employees and managers in managing for quality<br>– the role of teams and collaboration<br>– who makes decisions in quality organizations<br>– how quality is measured.<br>*Assessment Tool*<br>*Presentations/Reports: Managing for Quality (MAM2010–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 10 |
| • analyze the roles of managers and strategies used by managers to improve quality | • an analysis of four case studies using videos, magazine articles, books and/or newspaper clippings. Discuss strategies used by managers to plan, organize, lead, monitor and communicate to improve quality.<br>*Assessment Tool*<br>*Presentations/Reports: Managing for Quality (MAM2010–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 30 |


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**MODULE MAM2010: MANAGING FOR QUALITY** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • apply management systems and strategies | • a management analysis report that identifies an area that needs improvement, defines the problem, clarifies goals/rationale for changing the system, develops strategies for change, and plans, implements and monitors the change.<br>*Assessment Tool*<br>*Presentations/Reports: Managing for Quality (MAM2010–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 30 |
| • identify, through research, a current management system, and describe its effect on the organization | • a critical review of a current management system consisting of a summary of the practice including an overview, strategies used, pros and cons, and personal views regarding the system.<br>*Assessment Tool*<br>*Presentations/Reports: Managing for Quality (MAM2010–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 20 |
| • identify personal interests and opportunities as they relate to careers in management | • a career profile that includes job descriptions, education/qualification requirements, employment opportunities, advancement potential and salary range.<br>*Assessment Tool*<br>*Assessment Task: Career Profiles (MAMCARE)*<br>*Standard*<br>*Three career profiles, all sections completed* | 10 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |


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| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Quality Systems and Strategies | *The student should:*<br>• describe the role of the customer in managing for quality<br>• describe the role of front-line employees in managing for quality<br>• describe the role of managers in managing for quality<br>• describe how groups/teams can be used effectively<br>• describe decision-making processes when working in teams<br>• describe how quality is measured. | Planning, organizing, leading, monitoring, communicating.<br>Team size/type, team leader role, team decision.<br>End of line versus during production. |
| Strategies for Planning | • research *planning* as one of the basic management roles and elaborate on the importance of planning for quality:<br>– establishing objectives<br>– developing a mission statement and setting goals<br>– determining how objectives will be met<br>• compare management planning with team planning<br>• explain similarities and differences in forecasting/planning at the three management levels (strategic, tactical, operational)<br>• explain why contingency planning is vital. | Increased market share, profit, social responsibility.<br>Creating a vision.<br>Coordinating the organization's resources, personnel, finances, information, materials, facilities and what activities are required. |
| Strategies for Organizing | • research *organizing* as one of the basic management roles and elaborate on the importance of organizing for quality<br>• compare directing with facilitating<br>• explain how people working for a common objective can be organized for efficiency<br>• describe and provide examples of:<br>– organizational charts<br>– centralized versus decentralized control<br>– power, authority, responsibility, accountability, delegation. | Identify who is involved, who is in charge, what resources are required, and how communication will flow.<br>Synergism. |


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**MODULE MAM2010: MANAGING FOR QUALITY** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Strategies for Leading | *The student should:*<br>• research *leadership* as a basic management role and elaborate on the importance of leading for quality | How does a leader differ from a manager? |
| | • describe the different styles of leadership | Authoritarian, democratic. |
| | • compare controlling with empowering | |
| | • explain how "power" is obtained and used and the relationship of "power" and "authority" | |
| | • describe motivations and factors that affect individual motivational levels:<br>– individual differences (attitudes, needs)<br>– job characteristics (task and its significance, skill levels, autonomy, feedback, communication)<br>– organizational policies and practices (rules, intrinsic/extrinsic rewards) | |
| | • describe how effective leaders influence others to act:<br>– share influences and motivate individuals<br>– match individual aspirations with organization goals<br>– apply intuition, anticipate change, assess, respond<br>– vision—identify different/better ways of proceeding<br>– self-understanding—recognizing one's own strengths and weaknesses | |
| | • compare the types of groups that exist in an organization and explain how group development/processes can be encouraged. | For example, team planning, collaboration, shared decision-making. |
| Strategies for Monitoring | • research *monitoring* as a basic management role and elaborate on the importance of monitoring for quality | |
| | • explain how technology can be used to help monitor data, information, organizational activities | |
| | • describe ethical issues of monitoring and control of employees. | |


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**MODULE MAM2010: MANAGING FOR QUALITY** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Strategies for Communicating | *The student should:*<br>• research *communicating* as a basic management role and elaborate on the importance of communicating for quality:<br>– relationship between communication, action and quality results<br>• identify reasons for conflict and stress<br>• describe how a managers can deal effectively with conflict resolution. | Coordinate action between managers and workers. |
| Applying Quality Management Systems and Strategies | • use quality management systems and strategies in a group environment<br>• evaluate current management systems and strategies used by managers to increase quality. | For example, managing change, learning organizations, restructuring, downsizing, re-engineering, bionomics. |
| Career Exploration | • analyze a variety of career opportunities related to management<br>• identify personal interests and experiences as they relate to careers in management. | Define key terms to career path/ladders, entry-level positions, mid-management, upper management. |


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**COURSE MAM2090: PROMOTION: PRINT ADVERTISING**

**Level:** Intermediate

**Theme:** Marketing Systems and Strategies

**Prerequisite:** None

**Description:** Students are introduced to communication channels, delivery strategies and advertising media that can be used to inform potential customers about products and services available in the marketplace.

**Parameters:** Computer workstation with graphics software is recommended for print advertising.

**Supporting Course:** MAM1010 Management & Marketing Basics

**Curriculum and Assessment Standards**

| General Outcomes | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:*<br>• describe principles involved in the advertising process and apply these principles to print media | *Assessment of student achievement should be based on:*<br>• a concept test consisting of questions regarding the principle concepts and terminology in the advertising process including:<br>– definition of advertising and publicity<br>– controversial issues, laws, regulations and ethics in advertising<br>– identification and selection of target markets<br>– objectives of advertising<br>– examples of geographical advertising (local, regional, national, international)<br>– media: advantages and disadvantages of each medium and cost considerations (print and broadcast media).<br>*Assessment Tool*<br>*Sample Test Items*—Marketing Today: A Retail Focus, 2nd ed., *Teacher's Resource, Chapter 12 test*<br>*Standard*<br>*Rating of 60% or higher on concept test* | 20 |


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**COURSE MAM2090: PROMOTION: PRINT ADVERTISING** (continued)

| General Outcomes | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • evaluate print advertisements | • an evaluation of advertisements consisting of a collection of three advertisements from print media, which includes:<br>– target market, objective<br>– effective use of each component<br>– how the AIDA concept was used (**A**ttention, **I**nterest, **D**esire, **A**ction).<br>*Assessment Tool*<br>*Assessment Task: Evaluation of Print Advertisements (MAM2090–1)*<br>*Standard*<br>*Three advertisements evaluated for each media, all sections completed* | 20 |
| • design and create an effective print advertisement | • a project consisting of:<br>– preplanning of advertisement through use of rough draft, radio script or storyboard<br>– final draft<br>– presentation of the advertisements<br>– self-assessment of created advertisement.<br>*Assessment Tool*<br>*Assessment Guide: Print Advertisements (MAM2090–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 50 |
| • identify personal interests and opportunities as they relate to careers in advertising | • a career profile that includes job descriptions, education/qualification requirements, employment opportunities, advancement potential and salary range.<br>*Assessment Tool*<br>*Assessment Task: Career Profiles (MAMCARE)*<br>*Standard*<br>*Three career profiles, all sections completed* | 10 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |


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**COURSE MAM2090: PROMOTION: PRINT ADVERTISING** (continued)

| Concept | Specific Outcomes | Notes |
|---|---|---|
| | *The student should:* | |
| The Advertising Process | • explain what advertising is and what purpose it serves | Collect a range of advertisements and publicity notices and establish a portfolio or scrapbook. |
| | • differentiate between publicity and advertising | Gender stereotyping, misleading advertising, and regulations. |
| | • describe the various criticisms, controversies, laws and ethics regarding advertising | |
| • Target Market | • provide examples that illustrate a variety of target markets for the following types of advertisements:<br>– consumer products<br>– consumer services<br>– business product<br>– business service<br>– advocacy (institutional) advertising | Who will buy it, when, where? Are features of product or service transformed into customer benefits? |
| • Objectives | • describe a variety of objectives marketers use when developing advertising campaigns | For example, attract new customers, inform customers of a new product. |
| • Geographic Market | • provide specific examples of geographical promotional strategies:<br>– local<br>– regional<br>– national<br>– international | For example, small local businesses advertising locally versus large corporations advertising nationally. |
| • Media | • identify and provide examples of various print and broadcast media | |
| | • describe the advantages and disadvantages of each medium | |
| | • compare costs in relationship to return on investment (audience versus cost of creating/producing and placing advertisement). | |
| Creating a Print Advertisement | • explain the steps in planning a print advertisement:<br>– type of print media<br>– state the objective<br>– define the target audience<br>– select the buying motive (use of USP) | For example, newspaper, magazine, flyer, direct mail.<br><br>Unique selling points. |


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**COURSE MAM2090: PROMOTION: PRINT ADVERTISING** (continued)

| Concept | Specific Outcomes | Notes |
|---|---|---|
| Creating a Print Advertisement (continued) | *The student should:*<br>• identify and analyze each component of a print advertisement:<br>– borders<br>– headline(s)<br>– illustration or graphic<br>– copy<br>– logo (signature)<br>• demonstrate the use of effective layout arrangements:<br>– use of borders<br>– use of white space<br>– use of different fonts<br>– placement of the various components<br>• present and evaluate own print advertisement. | Use of AIDA concept: attract attention, create interest, stimulate desire, induce action. |
| Career Exploration | • analyze a variety of career opportunities in print advertising<br>• identify personal interests, talents and experiences as they relate to careers in print advertising. | Define key terms related to career path/ladders, entry-level positions, mid-management, management positions. |


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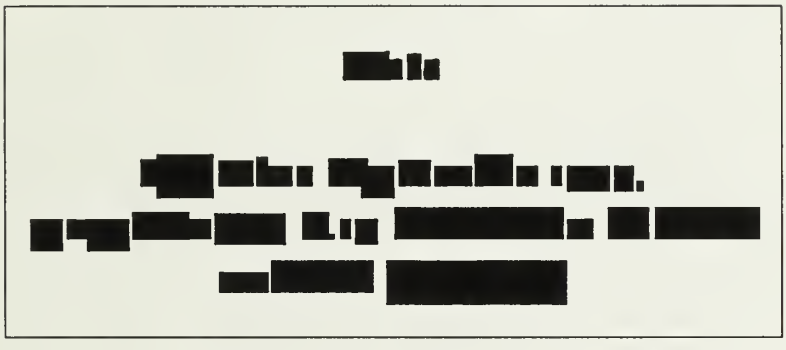


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**MODULE MAM2030: PROMOTION: VISUAL MERCHANDISING**

**Level:** Intermediate

**Theme:** Marketing Systems and Strategies

**Prerequisite:** None

**Module Description:** Students identify different types of visual merchandising, and describe how to construct attention-getting displays and how to evaluate visual merchandising.

**Module Parameters:** No specialized equipment or facilities.

**Supporting Modules:** MAM1010 Management & Marketing Basics
MAM2020 Promotion: Advertising

**Curriculum and Assessment Standards**

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • identify and explain basic visual merchandising concepts | • a visual merchandising manual using a choice of diagrams, pictures and/or video consisting of the following visual merchandising concepts:<br>– objectives and types of visual merchandising<br>– elements, principles and guidelines of visual merchandising.<br>*Assessment Tool*<br>*Assessment Task Checklist: Visual Merchandising Manual (MAM2030–1)*<br>*Standard*<br>*Rating of 2 in each applicable area* | 20 |
| • create a collection of visual merchandising ideas for a calendar year | • a yearly visual merchandising planner for a business. Minimum of eight visual merchandising ideas in the planner, which represents a full year's visual merchandising plan. Ideas should include type of display, theme, merchandise, props, supplies to be used and a sketch showing the elements and principles of design being applied.<br>*Assessment Tool*<br>*Assessment Task: Yearly Visual Merchandising Planner (MAM2030–2)*<br>*Standard*<br>*Rating of 2 in each applicable task area* | 20 |


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**MODULE MAM2030: PROMOTION: VISUAL MERCHANDISING** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • design and construct a visual merchandising presentation | • creating an interior and/or exterior visual presentation for a specific organization/business.<br>*Assessment Tool*<br>*Assessment Guide: Visual Merchandising Presentations (MAM2030–3)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 40 |
| • evaluate various forms of visual merchandising | • an evaluation of a minimum of three visual merchandising presentations that demonstrate use of design techniques.<br>*Assessment Tool*<br>*Assessment Task: Evaluation of Visual Merchandising Presentations (MAM2030–4)*<br>*Standard*<br>*Three evaluations, all sections completed* | 10 |
| • identify personal interests and opportunities as they relate to careers in visual merchandising | • a career profile that includes job descriptions, education/qualification requirements, employment opportunities, advancement potential and salary range.<br>*Assessment Tool*<br>*Assessment Task: Career Profiles (MAMCARE)*<br>*Standard*<br>*Three career profiles, all sections completed* | 10 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Visual Merchandising | *The student should:*<br>• describe what visual merchandising is and provide examples, illustrations and/or pictures of various displays/presentations | Linkages with Fashion Studies. |


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| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| | *The student should:* | |
| • Objectives | • explain how displays/visual presentations can influence the customer:<br>– route traffic<br>– catch attention<br>– expand window theme<br>– pleasant store environment<br>– quick product identification<br>– entice entry to store<br>– reinforce store image<br>– support sales presentations | The words *display* and *visual presentation* have the same meaning. Retailers use both; in general the term display is being replacing by the term visual presentation. |
| • Types | • describe the different types of visual merchandising presentations and provide examples:<br>– *interior* (open—gondola, shelving, racks, ledge, platform, etc.; closed—showcases and shadow boxes, architectural or built-up displays)<br>– *exterior* (closed, semi-closed, open)<br>– *season* (pre-season, runner, clearance)<br>• show how the interior presentations can be coordinated with exterior presentations | Assess the effectiveness of several retail outlet displays. |
| • Visual Merchandising Ideas | • describe how ideas are generated for visual merchandising<br>• list visual presentation ideas for a variety of events and themes. | Holiday themes, events, other displays, brainstorming with others. |
| Display Design | | |
| • Elements | • identify and describe the elements of design as they relate to visual merchandising:<br>– use of lines—vertical, horizontal, curve, diagonal<br>– use of shape—geometric, organic, positive, negative<br>– use of colour—terminology, schemes, moods<br>– background<br>– use of three-dimensional space<br>– use of weight, size and texture | Consider links with Design Studies and Communication Technology.<br>Props versus products, foreground versus background. |


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**MODULE MAM2030: PROMOTION: VISUAL MERCHANDISING** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| • Principles | *The student should:*<br>• identify and describe the principles of design as they relate to visual merchandising:<br>– patterns—interface, stairstep, gradation, pyramid, zigzag, repetition, radiation<br>– balance, formal and informal<br>– harmony and contrast<br>– rhythm<br>– proportion<br>– emphasis<br>– unity. | |
| Creating Visual Presentations<br>• Guidelines | • apply basic guidelines when creating visual presentations<br>– use the KIS concept (**K**eep **i**t **S**imple)<br>– keep the customer's viewpoint in mind<br>– use lighting to enhance the display<br>– use props to enhance the merchandise and theme | Props can be built, bought or borrowed. Use and construct different kinds of props. |
| • Planning and Creating | • apply the steps in planning a visual presentation:<br>– identify the objective<br>– select theme, merchandise and location<br>– compute cost of constructing presentation<br>– assemble supplies and materials needed<br>– prepare display area, merchandise and props<br>– construct the visual presentation<br>– maintain a display. | Clean windows, background and floor; merchandise neat and clean; props in good repair; maintain lighting fixtures. |


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**MODULE MAM2030: PROMOTION: VISUAL MERCHANDISING** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Evaluating Displays | *The student should:*<br>• evaluate the effectiveness of the visual presentation:<br>– location<br>– design<br>– theme<br>– impact/appeal<br>• recommend possible changes to the process of creating the presentation and to the display itself. | |
| Career Exploration | • analyze a variety of career opportunities in visual merchandising<br>• identify personal interest, talents and experiences as they relate to careers in visual merchandising. | Define key terms related to career path/ladders, entry-level positions, mid-management, management positions. |


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**MODULE MAM2040: RETAIL OPERATIONS**

**Level:** Intermediate

**Theme:** Marketing Systems and Strategies

**Prerequisite:** None

**Module Description:** Students identify retail operations that are typically performed off the selling floor, away from customers.

**Module Parameters:** No specialized equipment or facilities.
**Note:** A school store provides students with an on-site lab for most concepts in this module.

**Supporting Modules:** MAM1010 Management & Marketing Basics
MAM1020 Quality Customer Service

**Curriculum and Assessment Standards**

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • identify and report on a particular retailer's policies and practices | • identify and report on retail store policies and procedures used in the marketplace including: sales and services, credit and collection, store security, human resources and recordkeeping.<br>*Assessment Tool*<br>*Research Process: Retail Policies and Procedures (MAM2040–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 15 |
| • act as a buyer when purchasing goods and demonstrate ordering procedures | • a performance in a retail simulation or work situation consisting of:<br>– identifying vendors and products to purchase<br>– identifying stages in the product/fashion cycle for these products<br>– evaluating a minimum of two suppliers for quality, quantity, price and delivery for a variety of products<br>– determining merchandise to order<br>– preparing a purchase orders based on vendor selection and maintenance of an adequate stock.<br>*Assessment Tool*<br>*Assessment Task: Buying, Receiving and Payment of Goods and Services (MAM2040–2)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 15 |


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**MODULE MAM2040: RETAIL OPERATIONS** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • develop a checking, marking and stocking system to use after goods have been received | • a performance in a retail simulation or work situation consisting of:<br>– completing receiving dock procedures<br>– checking goods using different methods (e.g., direct, blind, quality, spot)<br>– marking goods<br>– stocking goods on or off the selling floor.<br>*Assessment Tool*<br>*Assessment Task: Buying, Receiving and Payment of Goods and Services (MAM2040–2)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 15 |
| • verify and process invoices for payment of goods and services received | • a performance in a retail simulation or work situation consisting of:<br>– verifying accuracy of invoices<br>– calculating due dates<br>– calculating discounts and net invoices<br>– recording payments in a cash journal<br>– paying invoices by cheque.<br>*Assessment Tool*<br>*Assessment Task: Buying, Receiving and Payment of Goods and Services (MAM2040–2)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 15 |
| • describe pricing strategies used by retailers | • a performance in a retail simulation or work situation consisting of:<br>– calculating markups based on cost and retail<br>– calculating markdowns<br>– calculating break-even points<br>– determining pricing policies<br>– tagging merchandise.<br>*Assessment Tool*<br>*Assessment Task: Pricing and Controlling Goods and Services (MAM2040–3)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 15 |


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**MODULE MAM2040: RETAIL OPERATIONS** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • demonstrate effective use of systems and strategies to control goods | • completing and evaluating an inventory system consisting of:<br>– counting and calculating goods in stock using a minimum of one inventory method (e.g., FIFO, LIFO, perpetual)<br>– preparing an inventory list<br>– calculating stock turns<br>– stocking merchandise on or off the selling floor.<br>– recommending procedures to improve system.<br>*Assessment Tool*<br>*Assessment Task: Pricing and Controlling Goods and Services (MAM2040–3)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 15 |
| • identify personal interests related to careers in retail operations including buying, receiving, stocking, storing and payment of merchandise | • a career profile that includes job descriptions, education/qualification requirements, employment opportunities, advancement potential and salary range.<br>*Assessment Tool*<br>*Assessment Task: Career Profiles (MAMCARE)*<br>*Standard*<br>*Three career profiles, all sections completed* | 10 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |


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**MODULE MAM2040: RETAIL OPERATIONS** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Retail Systems and Strategies | *The student should:*<br>• research and report on policies for a variety of retail stores including:<br>– sales and services<br>– credit and collection<br>– store security<br>– human resources<br>– recordkeeping. | |
| Systems and Strategies for Buying Goods | • describe the duties of a buyer<br>• identify how goods are classified:<br>– type of goods – convenience, impulse, shopping specialty and staple<br>– brand names – national, private, generic<br>• identify and discuss the product and fashion life cycle<br>• research buying data/sources:<br>– supplier information, sources, reputation<br>– product classification, price, availability<br>• use purchase order/requisition forms when buying goods<br>• explain what the following shipping terms mean and what impact they have on the buyer:<br>– FOB factory<br>– FOB destination<br>– FOB shipping point. | Good linkage with Information Processing: use of database, spreadsheet. |
| Systems and Strategies for Receiving Goods | • describe procedures and methods used for receiving goods (receiving, checking, storage, stocking)<br>• analyze what remedies the buyer has or what actions can be taken for:<br>– damage/breakage<br>– substitution/poor quality<br>– overage/shortage<br>– lost/misplaced order. | Signing of delivery receipt or packing slip for verification of number of cartons or boxes shipped.<br>Direct checks versus indirect (blind) checks against purchase orders, packing slips or invoices. |


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| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Systems and Strategies for Payment of Goods | *The student should:*<br>• verify the accuracy of invoices<br>• identify the different types of discounts available to retailers<br>• calculate discounts and the net totals of invoices<br>• record the purchases of goods received<br>• pay invoices by cheque or cheque requisition. | Trade, cash etc. |
| Systems and Strategies for Pricing and Marking | • calculate the markup of goods based on cost and retail price<br>• calculate break-even point<br>• identify and discuss what type of price tags should be used<br>• identify pertinent information to be included in price tags (including cost codes)<br>• identify how and when goods are marked down<br>• calculate the markdown of goods<br>• describe the application and effect of pricing policies:<br>– market penetration (low entry)<br>– skimming (high entry)<br>– comparable (competitive range)<br>– flexible (one-price, variable)<br>– relative (desired level). | Retail price, cost codes, department, season purchased, vendor, etc. |
| Systems and Strategies for Controlling and Storing Goods | • identify the different methods of inventory control available<br>• demonstrate the use of various methods<br>• explain and calculate stock turnover<br>• describe stocking and storage consideration from the buyer's perspective when orders are received:<br>– sales floor<br>– backup stock off the selling floor<br>– warehouse. | For example, first in, first out (FIFO), last in, first out (LIFO), perpetual. |


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**MODULE MAM2040: RETAIL OPERATIONS** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Career Exploration | *The student should:*<br>• analyze a variety of career opportunities in retail operations including buying, receiving, stocking and storing and payment of merchandise<br>• identify personal interests, talents and experiences as they relate to careers in retail operations. | Define key terms related to career path/ladders, entry-level positions, mid-management, management positions. |


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**MODULE MAM2050: OFFICE SYSTEMS 1**

**Level:** Intermediate

**Theme:** Information Management Systems and Strategies

**Prerequisite:** INF1030 Word Processing 1

**Module Description:** Students identify and describe strategies and procedures in the office environment and managing processes and protocols related to electronic equipment, written communication transmittal and business travelling arrangements.

**Module Parameters:** Access to electronic office equipment.

**Curriculum and Assessment Standards**

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • conduct an analysis of a selected office environment | • an analysis report of an office that includes:<br>– name and flow chart of organization<br>– rationale for how the office is organized<br>– explanation of how tasks are defined<br>– how the office focuses on quality<br>– strategies used to increase productivity<br>– identify and access office equipment used.<br>*Assessment Tool*<br>*Research Process: Office Systems 1 – Office Environments (MAM2050–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 10 |
| • demonstrate use of electronic equipment within office environment(s) | • a practical lab experience in a simulated or actual office. Show evidence of efficient use of three different electronic office equipment.<br>*Assessment Tool*<br>*Assessment Task: Office Systems 1 – Practical Lab Experience (MAM2050–2)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 40 |


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**MODULE MAM2050: OFFICE SYSTEMS 1** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • develop procedures for managing written communications transmittals | • an office manual or demonstration of work experience for written communication transmittals including:<br>– planning and organizing strategies and procedures for incoming and outgoing mail<br>– making decision regarding the appropriate postal or private services to use for a minimum of 10 different documents.<br>*Assessment Tool*<br>*Assessment Guide: Office Systems 1 – Written Communications/Transmittals (MAM2050–3)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 20 |
| • make travel arrangements for a business trip | • a travel project consisting of creating a business trip scenario and making arrangements for the trip including:<br>– gathering necessary information<br>– making decisions regarding who to book through, transportation and accommodations<br>– paying special attention to international travel<br>– preparing an itinerary<br>– preparing budget and expense claims.<br>*Assessment Tool*<br>*Assessment Guide: Office Systems 1 – Travel Project (MAM2050–4)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 20 |
| • identify personal interests related to office careers | • a career profile that includes job descriptions, education/qualification requirements, employment opportunities, advancement potential and salary range.<br>*Assessment Tool*<br>*Assessment Task: Career Profiles (MAMCARE)*<br>*Standard*<br>*Three career profiles, all sections completed* | 10 |


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**MODULE MAM2050: OFFICE SYSTEMS 1** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:*<br>• demonstrate basic competencies. | *Assessment of student achievement should be based on:*<br>• observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Office Environment | *The student should:*<br>• research how various business offices are organized with respect to:<br>– organizational structure<br>– priorities/philosophy<br>– design and layout<br>• identify the components of a work area:<br>– hardware<br>– software<br>– telecommunications<br>– resources/references<br>– ergonomics<br>• describe how the office supports a commitment to quality management:<br>– focus on customer<br>– accuracy, completeness, simplicity<br>– using references/research<br>• identify and assess strategies that increase personal productivity:<br>– time and work management<br>– setting priorities<br>– resource management<br>• use a variety of electronic office equipment. | Select from offices of: various sizes (e.g., home business, large business, community organization, telecommuting); various sectors of the economy (e.g., oil, service industry, real estate, insurance, health industry, auto dealership).<br>Telephones, photocopiers, calculators, electronic mail, facsimiles, dictaphones. |


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**MODULE MAM2050: OFFICE SYSTEMS 1** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Managing Written Communications | *The student should:*<br>• research strategies and procedures for small and large businesses regarding:<br>– processing incoming mail<br>– preparing outgoing mail<br>• research postal services available for transmitting documents:<br>– various classes of mail<br>– special services<br>– other carriers available (private couriers and messenger services)<br>• analyze the effect of electronic technology and communicating terminals on transmission of written documents. | For example, registered, special delivery. |
| Managing Travel Arrangements | • gather the necessary information to arrange a business trip<br>• select:<br>– how to handle bookings and reservations<br>– mode of transportation<br>– accommodations<br>• describe the special arrangements necessary when traveling internationally<br>• prepare budgets and expense claims for business trips<br>• prepare itineraries for business trips. | Self, travel agent, consumer group. |
| Professionalism | • demonstrate proper personal grooming and dress appropriate to the office environment<br>• research issues related to ethics and laws regarding the use of electronic office equipment. | For example, copyright laws. |
| Career Exploration | • analyze a variety of career opportunities related to the office work<br>• identify personal interests, talents and experiences as they relate to office careers. | Define key terms related to career path/ladders, entry-level positions, mid-management, management positions. |


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**MODULE MAM2060: COMMUNICATION STRATEGIES 2**

**Level:** Intermediate

**Theme:** Information Management Systems and Strategies

**Prerequisite:** MAM1030 Communication Strategies 1

**Module Description:** Students improve their basic oral and written communication strategies necessary to efficient, effective management of information. The focus is on technical writing strategies and composing at the computer when preparing informal business reports and proposals.

**Module Parameters:** Access to computer workstation.

**Curriculum and Assessment Standards**

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • critique informal business reports | • reading and critiquing a minimum of three informal reports in an area of interest in regards to content organization, clarity, completeness and use of proper sentence structure, grammar, spelling and punctuation. Suggest ways the report could be improved.<br>*Assessment Tool*<br>*Assessment Task: Communication Strategies, Read and Critique Technical Reports (MAMCOM–1)*<br>*Standard*<br>*Rating of 2, all questions answered* | 15 |
| • demonstrate use of the writing process; e.g., prewriting, writing, revising, proofreading, when composing business reports or proposals | • composing and formatting a minimum of two informal reports in an area of interest. Show evidence that the writing process was followed during preparation (prewriting, writing, revising, proofreading).<br>*Assessment Tool*<br>*Assessment Guide: Communication Strategies Writing Projects (MAMCOM–2)*<br>*Standard*<br>*Rating of 2 in all applicable tasks* | 70 |


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**MODULE MAM2060: COMMUNICATION STRATEGIES 2** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • deliver an oral report, using effective communication strategies | • an oral presentation consisting of a minimum five-minute presentation on a designated topic. Show evidence of effective oral communication strategies including non-verbal skills.<br>*Assessment Tool*<br>*Assessment Guide: Communication Strategies Oral Presentations (MAMCOM–3)*<br>*Standard*<br>*Rating of 2 in all applicable tasks* | 15 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Preparing to Write Technical Reports | *The student should:*<br>• research the types of business situations that require technical reports:<br>– investigative report, analysis of a particular problem<br>– evaluation of an existing situation or a proposed action<br>– response to a situation or incident<br>– progress being made on a long-term project<br>– proposal, persuades the reader to adopt a change | Select from offices of: various sizes (e.g., home business, large business, community organization, telecommuting); various sectors of the economy (e.g., oil, service industry, real estate, insurance, health industry, auto dealership). |


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| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Preparing to Write Technical Reports (continued) | *The student should:*<br>• distinguish between the need for informal and formal reports in business environments:<br>– situation<br>– audience<br>– details of investigation<br>• compare the characteristics between informal and formal writing including:<br>– writing styles<br>– length and layout. | |
| Writing Effective Informal Reports | • research and use *prewriting* strategies when preparing informal reports:<br>– identify the purpose<br>– list key points<br>– discussion of finding<br>• outline the sections of an informal report:<br>– summary<br>– introduction<br>– discussion<br>– conclusion(s)<br>– recommendations<br>– appendices—charts, supporting data, diagrams<br>• *draft* the informal report using the following strategies:<br>– write in an unbiased manner<br>– substantiate opinions<br>– be specific<br>– construct and attach any appendices<br>• identify and use *revising* strategies such as asking questions like the following:<br>– is the report properly focused?<br>– is the report complete?<br>– are conclusions and recommendations logical with the findings?<br>– are there any inconsistencies or contradictions? | Use word-processing programs, templates. |


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**MODULE MAM2060: COMMUNICATION STRATEGIES 2** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Writing Effective Informal Reports (continued) | *The student should:*<br>• identify and use *proofreading* strategies:<br>– proofread for facts, dates, names, figures and statistical information<br>– proofread for sentence structure, grammar, spelling, punctuation and format. | |
| Oral Communications | • give oral instructions in person or on a recording to enable another person to complete a specified task<br>• receive instructions from a person or on a recording and develop a plan to complete a specified task<br>• rehearse a prepared oral or written report on a business topic using effective oral communication strategies. | |


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**MODULE MAM2080: RECORDS MANAGEMENT 1**

**Level:** Intermediate

**Theme:** Information Management Systems and Strategies

**Prerequisite:** None

**Module Description:** Students demonstrate basic records management skills for a manual records system, emphasizing alphabetic coding procedures.

**Module Parameters:** Access to a computer workstation with database software, if completing this module electronically.

**Curriculum and Assessment Standards**

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • identify and describe basic filing/records management concepts | • a concept test consisting of questions related to planning and organizing a filing/records management system manually or electronically and creating and/or using a manual or electronic alphabetic records management system.<br>*Assessment Tool*<br>*Sample Test Items:* Pitman Office Handbook Workbook, *pp. 148–150 or sample activity p. 151, or* Quick Filing Practice Teacher's Manual, *Quiz 1 – 4, pp. 17–23*<br>*Standard*<br>*Rating of 65% or higher on concept test* | 30 |
| • demonstrate ability to organize and use an alphabetic filing/records management system | • a records management project (manual or electronic) consisting of:<br>– organizing a system for alphabetic records<br>– indexing records<br>– cross-referencing records<br>– using the system to store, retrieve and/or manipulate records.<br>*Assessment Tool*<br>*Assessment Guide: Records Management Project (MAM2080–1)*<br>*Standard*<br>*Rating of 1 in each applicable task with 65% accuracy* | 60 |


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**MODULE MAM2080: RECORDS MANAGEMENT 1** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • identify personal interests and opportunities as they relate to careers in records management | • a career profile that includes job descriptions, education/qualification requirements, employment opportunities, advancement potential and salary range.<br>*Assessment Tool*<br>*Assessment Task: Career Profiles (MAMCARE)*<br>*Standard*<br>*Three career profiles, all sections completed* | 10 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Records Management Basics | *The student should:*<br>• describe records and describe why records are kept<br>• identify a variety of records management systems<br>• compare a manual filing system with an electronic records system<br>• research laws regarding use and access to records management systems<br>• identify potential problems associated with records management systems<br>• identify the four main types of filing methods (alphabetic, numeric, subject, geographic) | Local filing and records management system currently in use such as video store or doctor's office. |


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**MODULE MAM2080: RECORDS MANAGEMENT 1** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Records Management Basics (continued) | *The student should:*<br>• analyze appropriate procedures to create a records management system:<br>– objectives and goals<br>– assessment of system needed (types of information to be stored, best format for storing information):<br>• centralized or decentralized<br>• manual or electronic<br>• filing method<br>– procedures for using the system (what records to keep, who will keep them, where to store records before filing, when to file, when to purge). | The purpose of keeping records, establishing filing/record storage systems. |
| Organizing an Alphabetic Filing/Records Management System | • identify records that are managed alphabetically<br>• research the steps to be completed when filing (inspecting, indexing, sorting, coding and storing)<br>• describe the function of cross-referencing<br>• practise using the rules for alphabetic filing by indexing a variety of records and filing them<br>• identify and describe filing equipment and supplies necessary to create and maintain an efficient manual filing system. | If using a filing practice set, laminate indexing cards and correspondence. Students can use soluble felts for indexing and wipe them clean for reuse after tasks have been completed. |
| Storing and Monitoring Alphabetic Records | • store new data or records in a filing/records management system<br>• retrieve records from a manual filing system<br>• analyze strategies to prevent records from being misfiled or managed. | |
| Career Exploration | • analyze a variety of career opportunities related to records management<br>• identify personal interests, talents and experiences as they relate to careers in records management. | Define key terms related to career path/ladders, entry-level positions, mid-management, management positions. |


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# COURSE CURRICULUM AND ASSESSMENT STANDARDS:
# SECTION F: ADVANCED LEVEL

The following pages define the curriculum and assessment standards for the advanced level of Management and Marketing.

> Advanced level courses demand a higher level of expertise and help prepare students for entry into the workplace or a related post-secondary program.


Course MAM3010: The Business Organization ..... F.3
Course MAM3020: Business in the Canadian Economy ..... F.9
Course MAM3030: Business in the Global Marketplace ..... F.13
Course MAM3040: Promotion: Sales Techniques ..... F.19
Course MAM3050: Distributing Goods and Services ..... F.25
Course MAM3060: Setting Up a Retail Store ..... F.29
Course MAM3070: Office Systems 2 ..... F.32
Course MAM3080: Communication Strategies 3 ..... F.37
Course MAM3090: Records Management 2 ..... F.41
Course MAM3100: Promotion: Broadcast Advertising ..... F.45




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**MODULE MAM3010: THE BUSINESS ORGANIZATION**

**Level:** Advanced

**Theme:** Business Management Systems and Strategies

**Prerequisite:** None

**Module Description:** Students identify and describe organizational structures, management theories and organizations as working units. Students also explain their beliefs of what successful organizations might look like in the future.

**Module Parameters:** No specialized equipment or facilities.

**Supporting Modules:** MAM1010 Management & Marketing Basics
MAM2010 Managing for Quality

**Curriculum and Assessment Standards**

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • identify and assess local examples of different types of organizational structures | • a presentation of organizational charts of local businesses/organizations that present the four main organizational structures (functional, line and staff, geographical and matrix). Assess each organization's levels of management and channels of communications.<br>*Assessment Tool*<br>*Presentations/Reports: The Business Organization (MAM3010–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 15 |
| • analyze the different management theories and forecast future trends | • analyzing a minimum of three management theories, each consisting of an overview, strengths and weaknesses of each, organizational strategies for each theory, personal views of the theory they like best, and personal opinions regarding future trends.<br>*Assessment Tool*<br>*Presentations/Reports: The Business Organization (MAM3010–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 30 |


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**MODULE MAM3010: THE BUSINESS ORGANIZATION** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • examine the purpose of the following areas in a business organization, and the roles and responsibilities for managers in each of these areas:<br>– research and development<br>– production<br>– finance<br>– marketing<br>– purchasing<br>– administration<br>– human resources | • a concept test or report consisting of the roles and responsibilities of managers in the functional areas of research and development, production, finance, marketing, purchasing, administration and human resources.<br>*Assessment Tool*<br>*Presentations/Reports: The Business Organization (MAM3010–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 15 |
| • identify why businesses succeed/fail and how organizations measure their success/failure | • a critique consisting of a minimum of three businesses that have succeeded and/or failed. Describe how these businesses rate success/failure and measure performance.<br>*Assessment Tool*<br>*Presentations/Reports: The Business Organization (MAM3010–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 20 |
| • evaluate a current challenge facing managers in today's society | • a presentation of a current issue facing managers consisting of identifying the issues, the reason it is a challenge to managers, any controversy surrounding the issue, possible solutions to resolve the issue, personal views on the issue.<br>*Assessment Tool*<br>*Presentations/Reports: The Business Organization (MAM3010–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 10 |


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**MODULE MAM3010: THE BUSINESS ORGANIZATION** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • identify personal interests and opportunities as they relate to careers in large organizations | • a career profile that includes job descriptions, education/qualification requirements, employment opportunities, advancement potential and salary range.<br>*Assessment Tool*<br>*Assessment Task: Career Profiles (MAMCARE)*<br>*Standard*<br>*Three career profiles, all sections completed* | 10 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Organizational Structures | *The student should:*<br>• analyze the types of organizational structures including:<br>– functional (organized by functions)<br>– line and staff (organized by product line)<br>– geographical (organized by region)<br>– committee and matrix (organized by teams)<br>• diagram a firm's organization for each type of structure<br>• research the levels of management in the managerial hierarchy for each structure<br>• describe the channels of communications and flow of information for a variety of organizations. | Production, accounting, divisional, by product west, central, eastern, project-oriented.<br>Use organizational charts.<br>Top-level, mid-level, supervisory. |


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**MODULE MAM3010: THE BUSINESS ORGANIZATION** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Management Theories | *The student should:*<br>• research and critique popular theories of management including:<br>– classical<br>– scientific management<br>– management by objectives<br>– management by wandering around<br>– Japanese model<br>– total quality management<br>– site-based management<br>– future trends<br>• determine and justify the best organizational structure(s) to use for each theory<br>• determine and justify the theory (or combination of theories) that best fit the needs of present-day society. | |
| Management Functions | • research management roles in the following functional areas and explain management tasks and responsibilities in each:<br>– research and development<br>– production/manufacturing<br>– finance/accounting<br>– marketing<br>– purchasing<br>– administration<br>– human resources<br>• explain how each function fits within the organization, key components of the function and characteristics of successful/effective members. | Top-level, mid-level, supervisory (line). |
| Indicators of Success | • identify common reasons why organizations succeed/fail:<br>– business organizations<br>– retail organizations<br>• describe how an organization can rate its success<br>• describe how performance (owner, manager, support team) can be measured and recognized. | For example, profit, customer/client loyalty, employee commitment/loyalty. |


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| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Professional Conduct of Organizations | *The student should:*<br>• identify and analyze ethical challenges that affect organizations and personnel:<br>– interpersonal interactions within the organization<br>– company policies and protocols<br>– customers interactions<br>– business associates and competitors<br>• describe examples of how social responsibility has been addressed/not addressed by an organization. | Unemployment; human rights; environmental concerns regarding land, air, water. |
| Career Exploration | • analyze a variety of career opportunities related to large organizations<br>• identify personal interests and experiences as they relate to careers in large organizations. | Define key terms to career path/ladders, entry-level positions, mid-management, upper management. |


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**MODULE MAM3010: THE BUSINESS ORGANIZATION** (continucd)

| Concept | Spccific Learncr Expcctations | Notcs |
|---|---|---|
| Management Thcories | *The student should:*<br>• research and critique popular theories of management including:<br>– classical<br>– scientific management<br>– management by objectives<br>– management by wandering around<br>– Japanese model<br>– total quality management<br>– site-based management<br>– future trends<br>• determine and justify the best organizational structure(s) to use for each theory<br>• determine and justify the theory (or combination of theories) that best fit the needs of present-day society. | |
| Management Functions | • research management roles in the following functional areas and explain management tasks and responsibilities in each:<br>– research and development<br>– production/manufacturing<br>– finance/accounting<br>– marketing<br>– purchasing<br>– administration<br>– human resources<br>• explain how each function fits within the organization, key components of the function and characteristics of successful/effective members. | Top-level, mid-level, supervisory (line). |
| Indicators of Success | • identify common reasons why organizations succeed/fail:<br>– business organizations<br>– retail organizations<br>• describe how an organization can rate its success<br>• describe how performance (owner, manager, support team) can be measured and recognized. | For example, profit, customer/client loyalty, employee commitment/loyalty. |


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**MODULE MAM3010: THE BUSINESS ORGANIZATION** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Professional Conduct of Organizations | *The student should:*<br>• identify and analyze ethical challenges that affect organizations and personnel:<br>– interpersonal interactions within the organization<br>– company policies and protocols<br>– customers interactions<br>– business associates and competitors<br>• describe examples of how social responsibility has been addressed/not addressed by an organization. | Unemployment; human rights; environmental concerns regarding land, air, water. |
| Career Exploration | • analyze a variety of career opportunities related to large organizations<br>• identify personal interests and experiences as they relate to careers in large organizations. | Define key terms to career path/ladders, entry-level positions, mid-management, upper management. |


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**MODULE MAM3020: BUSINESS IN THE CANADIAN ECONOMY**

**Level:** Advanced

**Theme:** Business Management Systems and Strategies

**Prerequisite:** None

**Module Description:** Students expand and relate their knowledge of economics to how business decisions are made within the community, the province, nationally and internationally.

**Module Parameters:** No specialized equipment or facilities.

**Supporting Modules:** MAM1010 Management & Marketing Basics
MAM2010 Managing for Quality

**Curriculum and Assessment Standards**

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • identify basic economic terms and concepts | • a concept test related to basic economic systems and strategies.<br>*Assessment Tool*<br>*Sample Test Items:* World of Business: A Canadian Profile, *3rd ed., Workbook, Chapters 2, 12 and 19*<br>*Standard*<br>*Rating of 60% or higher on concept test* | 20 |
| • demonstrate knowledge of the Canadian economy | • a report or presentation consisting of:<br>– explanation of Canada's mixed economy<br>– goals of the Canadian economic system<br>– examples of goods and services provided in the public and private sector<br>– circular flow, role of profit<br>– timeline of Canada's business cycle over the past 50 years and actions taken to stabilize the economy<br>– explanation of how income is earned and spent<br>– role of the Bank of Canada and other financial institutions<br>– construct and explain supply and demand graphs.<br>*Assessment Tool*<br>*Research Process: Business in the Canadian Economy (MAM3020–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 50 |


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**MODULE MAM3020: BUSINESS IN THE CANADIAN ECONOMY** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • identify, describe and evaluate an economic issue challenging Canadian businesses | • a position paper that:<br>– identifies an issue<br>– summarizes the concerns of all sides<br>– states personal position<br>– recommends course of action.<br>*Assessment Tool*<br>*Research Process: Business in the Canadian Economy (MAM3020–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 30 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Economic Systems and Strategies | *The student should:*<br>• describe the important role of economics in our personal lives<br>• research how scarcity imposes the need to make choices by the individual and by society<br>• describe how all choices are "trade-offs" or "opportunity costs"<br>• cite examples of opportunity costs<br>• describe the factors of production (land, labour, capital)<br>• evaluate goods and services within the community and determine who produces and consumes them.<br>• research the key decisions of consumers (What to purchase? How many to purchase, at what cost?)<br>• research the key decisions of producers (What to produce? How many to produce? With what resources? What cost?) | See MAM1010.<br>Include examples from both the public and private sectors. |


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| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Economic Systems and Strategies (continued) | *The student should:*<br>• analyze the interrelationship of consumers and producers<br>• explain key economic indicators:<br>– Gross Domestic Product (GDP)<br>– personal income<br>– consumer price index<br>– unemployment rates<br>– stock/bond markets<br>• compare the different types of economic systems listing the characteristics, advantages and disadvantages of each:<br>– market<br>– command<br>– mixed. | |
| Canadian Economic System and Strategies | • research the goals of our Canadian economic system<br>• explain the role of profit in our mixed economy<br>• research the circular flow of our economy and its effects on:<br>– consumers<br>– government<br>– business<br>– Gross Domestic Product<br>• describe the business cycle during times of prosperity and depression<br>• explain actions the government might take to stabilize our economy<br>• explain how income is earned and spent<br>• describe the role of the Bank of Canada and other banking institutions in determining interest rates and the relationship interest rates have on purchases, investments, etc. | |


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**MODULE MAM3020: BUSINESS IN THE CANADIAN ECONOMY** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Supply, Demand, Price | *The student should:*<br>• research the laws of supply and demand<br>• analyze the effects of supply and demand on price in a variety of market scenarios<br>• identify recent examples of how the market has made adjustments to price and supply of various goods and services. | Elasticity of supply and demand, external influences, government influences.<br>With and without competition, with and without marketing/ advertising initiatives. |
| Economic Issues Challenging Canadian Business | • identify key issues that challenge Canadian business (community, region, province, nation, international)<br>• research one of these issues in depth. | Economic growth versus environmental (air, land, water) issues, regional disparity and diversity, changing work force, dealing with unemployment. |


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**MODULE MAM3030: BUSINESS IN THE GLOBAL MARKETPLACE**

**Level:** Advanced

**Theme:** Business Management Systems and Strategies

**Prerequisite:** None

**Module Description:** Students identify the opportunities and challenges that confront business people in establishing a global business operation.

**Module Parameters:** No specialized equipment or facilities.

**Supporting Modules:** MAM1010 Management & Marketing Basics
MAM2010 Managing for Quality
MAM3020 Business in the Canadian Economy

**Curriculum and Assessment Standards**

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • compare existing international business ventures within developing and developed nations | • researching a minimum of four businesses (two with developing and two with developed nations) and reporting the following:<br>– name of company and products and/or services<br>– organizational structure (e.g., multinational)<br>– management and marketing systems and strategies<br>– constraints and considerations identified when doing business with the foreign nation<br>– local challenges resulting from global competition.<br>*Assessment Tool*<br>*Presentations/Reports: Business in the Global Marketplace (MAM3030–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 15 |
| • identify and examine existing legislation that affects global ventures | • a concept test consisting of questions related to global business legislation, regulations and organizations including:<br>– basic concepts of international trade.<br>– provincial and Canadian legislation<br>– trading blocs, agreements and policy.<br>*Assessment Tool*<br>*Sample Test Items:* World of Business: A Canadian Profile, *3rd ed, Workbook, Chapters 6, 7, 8*<br>*Standard*<br>*Rating of 60% or higher on concept test* | 15 |


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**MODULE MAM3030: BUSINESS IN THE GLOBAL MARKETPLACE** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • analyze existing global ventures | • analyzing a minimum of four case studies using videos, magazine articles, books and/or newspaper clippings, which represent the use of different management and marketing strategies in the global marketplace.<br>*Assessment Tool*<br>*Presentations/Reports: Business in the Global Marketplace (MAM3030–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 20 |
| • identify and investigate global entrepreneurial opportunities within a developing and a developed nation | • a research project on the global marketplace. See Global Marketplace Research Project.<br>*Assessment Tools*<br>*Sample Project: Global Marketplace Project (MAM3030–2)*<br>*Research Process: Business in the Global Marketplace Project (MAM3030–3)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 50 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |


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**MODULE MAM3030: BUSINESS IN THE GLOBAL MARKETPLACE** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Global Business Opportunities | *The student should:*<br>• explain global marketplace terms<br>• identify and describe a variety of international businesses including organizational structures, manager roles and responsibilities for foreign companies in Canada; Canadian companies abroad<br>• describe the pros and cons of various forms of international business opportunities. | For example, sanctions, imports, exports, tariffs, embargo.<br>Conglomerates, multinational, small business, franchise foreign subsidiaries, joint ventures, off shore.<br>Use of SWOT (strengths, weaknesses, opportunities, threats). |
| Legislation and Policies | • research existing provincial legislation/ regulations that promote or hinder trade within Canadian<br>• research Canadian and other nation legislation/regulations that promote or hinder trade with Canada<br>• explain and describe the:<br>– World Trade Organization<br>– Canada/US Free Trade Agreement<br>– North American Free Trade Agreement<br>– European Economic Community<br>– Asian Pacific Rim<br>– other international trading agreements<br>• describe a "protectionism" policy and the historical effect it has had on countries<br>• describe/debate Canada/U.S. actions regarding:<br>– tariffs (import and export tax)<br>– dumping<br>• prepare an organization chart with functions, duties, descriptions, and examples of:<br>– export department<br>– export manager<br>– commission agent<br>• research the role of the World Bank in international business | What are the strengths and weaknesses of each bloc?<br>Use of SWOT (strengths, weaknesses, opportunities, threats).<br>E.g., importing and dumping of sugar beets in Canada and its effect on the Alberta economy. |


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**MODULE MAM3030: BUSINESS IN THE GLOBAL MARKETPLACE** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Legislation and Policies (continued) | *The student should:*<br>• describe the basic concepts of international trade from a fiscal and economic position:<br>– balance of trade<br>– balance of payments<br>– exchange rate (floating, devaluation, revaluation)<br>– counter trade. | |
| Strategies for Operating in the Global Marketplace | • describe the concept of "profit with principles" when doing business with developing nations<br>• describe the global competitive forces being exerted on the Canadian business community<br>• explain how a Canadian business operation might determine its "niche" in the international marketplace<br>• research and summarize how management organizes for an effective international strategy:<br>– development of new products/services<br>– maximize advanced technology capability (communication, research, production)<br>– using resources from the local community<br>– identify local economic political, social and environmental issues<br>– clarify profit targets<br>• research and explain possible involvement opportunities on the international business scene (provide examples and identify management's role):<br>– exporting<br>– importing (directly/indirectly)<br>– licensing (licensee/licenser)<br>– franchising (franchisee/franchiser)<br>– foreign marketing<br>– foreign production and marketing. | *Marketing Today*, The Body Shop Case Study, p. 291.<br>Trading blocs, telecommunications.<br>How is the business unique in the global marketplace?<br>Students may want to research international marketing blunders.<br>Use of local personnel (e.g., translators) who know the local market can help make decisions regarding the market, transportation, advertising, sales, and production, use of trade commissioners. |


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**MODULE MAM3030: BUSINESS IN THE GLOBAL MARKETPLACE** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Constraints and Conditions | *The student should:*<br>• research and assess managerial considerations in a foreign country; e.g.:<br>– geographical conditions<br>– economic conditions<br>– social conditions<br>– political conditions<br>– cultural differences<br>– environmental conditions<br>• contrast risks/challenges to opportunities and indicate on what basis a positive decision would be made to proceed with a foreign venture<br>• describe how management practices differ in the global marketplace in relation to:<br>– leadership practices<br>– organization structure<br>– employee motivation levels/incentives<br>– quality standards. | |


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**COURSE MAM3040: PROMOTION: SALES TECHNIQUES**

**Level:** Advanced

**Theme:** Marketing Systems and Strategies

**Prerequisite:** None

**Description:** Students learn techniques for successful selling.

**Parameters:** No specialized equipment or facilities.

**Supporting Courses:** MAM1010 Management & Marketing Basics
MAM2090 Promotion: Print Advertising

**Curriculum and Assessment Standards**

| General Outcomes | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • critique salespersons and customers during the selling process | • critiquing a minimum of three sales presentations from a variety of resources including:<br>– live<br>– video<br>– cases.<br>*Assessment Tool*<br>*Assessment Task: Observe and Critique Sales Presentations (MAM3040–1)*<br>*Standard*<br>*Critique 3 presentations, all sections completed* | 20 |
| • develop and demonstrate proper sales techniques | • planning, presenting and self-assessing a person-to-person sales presentation using a product that can be demonstrated. Include all steps of the selling process.<br>*Assessment Tool*<br>*Assessment Guide: Sales Presentation (MAM3040–2)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 70 |
| • identify personal interests and opportunities as they relate to careers in sales | • a career profile that includes job descriptions, education/qualification requirements, employment opportunities, advancement potential and salary range.<br>*Assessment Tool*<br>*Assessment Task: Career Profiles (MAMCARE)*<br>*Standard*<br>*Three career profiles, all sections completed* | 10 |


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**COURSE MAM3040: PROMOTION: SALES TECHNIQUES** (continued)

| General Outcomes | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:*<br>• demonstrate basic competencies. | *Assessment of student achievement should be based on:*<br>• observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |

| Concept | Specific Outcomes | Notes |
|---|---|---|
| The Salesperson | *The student should:*<br>• define selling and discuss the role of the salesperson in:<br>– the buying and selling process<br>– selling self, the products/services, the business<br>– human relations<br>• discuss the effect of ethical and legal considerations on the role of the salesperson<br>• identify personality traits that are needed by salespeople and indicate why they are important<br>• list characteristics that customers expect to find in a salesperson and indicate:<br>– why they are important<br>– why they can have either a positive or negative effect<br>• explain what is required in a successful sales presentation. | |
| Satisfying Customers | • describe why people buy<br>• describe different customer types<br>• describe what produces satisfaction when making a personal purchase:<br>– evaluation of alternatives<br>– making the purchase<br>– re-evaluating the purchase. | See Quality Customer Service (MAM1020). |


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**MODULE MAM3040: PROMOTION: SALES TECHNIQUES** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| | *The student should:* | |
| Steps of a Sale | • describe how a salesperson prepares for the customer:<br>– customer characteristics/motives<br>– product/service information | Practise sale techniques through role playing. |
| • Pre-approach | • research and analyze information related to prospective customers and product information | |
| • Approach | • explain how the welcome statement can help get attention and establish customer rapport | |
| | • practise using different approaches for a variety of situations including social, service and merchandising | |
| • Determining Customer Needs and Wants | • explain the effectiveness and timing used by the salesperson to identify the customer needs and wants:<br>– observe customer<br>– selling statement(s)<br>– ask question(s)<br>– listen to customer | |
| | • develop a series of questions to determine the customer's needs | |
| • Planning the Presentation | • describe the importance of determining the type of customer and how the sales presentation is tailored to encourage the customer | Decided, undecided, just looking, friendly, know-it-all, silent, deliberate. |
| | • explain how the salesperson can recognize customer buying signals | |
| | • suggest possible sales activities/responses for customer personality types | |
| | • describe the use of sensory appeal in sales demonstrations and how it is effective | Sensory appeal—appeal to the five senses: taste, touch, sight, hearing, smell. |
| | • identify other techniques that are used by salespersons to encourage customers | |
| | • list at least 10 unique selling points (USP) for a product | |
| | • turn product features or USPs into customer benefits | (USP: unique selling points). |


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| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| | *The student should:* | |
| • Handling Customer Objections | • explain what a salesperson can do to counteract customer:<br>– excuses<br>– objections | |
| | • describe possible techniques for answering objections and indicate under what circumstances they could be appropriately used as an answering method | Question, yes, but, superior point, direct-denial, boomerang, third-party, demonstration, close-on-an objection. |
| | • prepare a variety of objections that customers may raise and describe how to overcome these objections effectively | |
| • Closing the Sale | • describe how a natural close to the sale can be achieved by including the following alternatives:<br>– stop demonstrating/showing the product<br>– narrow the selection<br>– discuss ownership<br>– ask to buy (will this be cash or charge)<br>– determine why there is reluctance<br>– be confident | |
| | • describe the conditions under which the salesperson determines the appropriate time to close the sale | |
| | • explain the purpose of the trial close and how it can be included in the sales discussion | |
| | • list a variety of closing techniques and describe the circumstances that would best support each | Obtain small favourable decisions.<br>Reinforce added decisions. |
| | • describe lost sales, errors in closing a sale and preparing for the next sale | Seek frequent agreement.<br>Narrow the choice.<br>Assumption (will this be cash or charge?).<br>Offer a premium.<br>Last-chance-to-buy. |
| | • identify the techniques that can be used to support more sales (currently, in the future) | For example, suggestion selling (ask if customer would like a tie with a suit or sell an extended warranty with an automobile). |
| | • demonstrate the mechanics of closing:<br>– ringing in the sale<br>– wrapping/bagging merchandise<br>– taking leave. | |


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**MODULE MAM3040: PROMOTION: SALES TECHNIQUES** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Non-selling Duties | *The student should:*<br>• describe how sales support activities link to success in sales:<br>– stock-keeping<br>– housekeeping<br>– building displays<br>– preventing loss/waste<br>– directing customers<br>– handling complaints<br>– following store policy. | See Quality Customer Service (MAM1020). |
| Career Exploration | • analyze a variety of career opportunities in sales<br>• identify personal interests, talents and experiences as they relate to careers in sales | Define key terms related to career path/ladders, entry-level positions, mid-management, management positions. |


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**MODULE MAM3050: DISTRIBUTING GOODS & SERVICES**

**Level:** Advanced

**Theme:** Marketing Systems and Strategies

**Prerequisite:** None

**Module Description:** Students explore the channels of distribution and modes of transportation used to direct goods from the producer to the consumer.

**Module Parameters:** No specialized equipment or facilities.

**Supporting Modules:** MAM1010 Management & Marketing Basics
MAM2040 Retail Operations

**Curriculum and Assessment Standards**

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • identify and compare different channels of distribution and modes of transportation | • a concept test consisting of questions related to:<br>– different channels of distribution available to marketers and the generic-types of products that traditionally flow through each channel<br>– a comparison relating the modes of transportation available in the marketplace<br>– middlemen used in distribution (e.g., wholesalers and agents).<br>*Assessment Tool*<br>*Sample Test Items:* Marketing Today: A Retail Focus, Teacher's Resource, *Chapter 1 test*<br>*Assessment Task: Comparing Modes of Transportation (MAM3050–1)*<br>*Standard*<br>*Rating of 50% or higher on concept test all sections competed in chart for modes of transportation* | 20 |
| • identify and describe different types of retailers present in the community | • a presentation consisting of types and names of local retailers; including the lines of merchandise or services they offer.<br>*Assessment Tool*<br>*Assessment Task: Examine Types of Retailing (MAM3050–2)*<br>*Standard*<br>*All sections completed in chart for types of retailing* | 20 |


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**MODULE MAM3050: DISTRIBUTING GOODS AND SERVICES** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • identify and present the channels of distribution and modes of transportation used for a manufactured product | • a presentation/research project consisting of selecting a manufactured product, researching the product back to its raw material state, visually presenting all channels of distribution and modes of transportation used to bring the product to the consumer.<br>*Assessment Tool*<br>*Assessment Guide: Channels of Distribution Presentation (MAM3050–3)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 50 |
| • identify personal interests and opportunities as they relate to careers in distribution | • a career profile that includes job descriptions, education/qualification requirements, employment opportunities, advancement potential and salary range.<br>*Assessment Tool*<br>*Assessment Task: Career Profiles (MAMCARE)*<br>*Standard*<br>*Three career profiles, all sections completed* | 10 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Channels of Distribution Systems and Strategies | *The student should:*<br>• define channels of distribution and provide examples<br>• research the three major distribution policies and provide examples of products that follow each policy:<br>– extensive<br>– selective<br>– exclusive | |


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| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Channels of Distribution Systems and Strategies (continued) | *The student should:*<br>• evaluate the role of producers, processors, manufacturers, agents, brokers, wholesalers, retailers and consumers, and identify examples of each<br>• compare the most common types of channels and provide examples of products that go through each channel:<br>– produce to consumer (direct)<br>– one intermediary (retailer)<br>– two intermediaries (wholesaler, retailer)<br>– three intermediaries (agent, wholesaler, retailer)<br>• research the role of a broker, commission agent (sales, manufacturer). | |
| Wholesalers and Agents | • list the functions of a wholesaler<br>• research the importance of wholesalers to manufacturers, to retailers<br>• research local wholesalers in his or her community<br>• describe the different types of agent intermediaries and their role in the distribution process. | Real-estate agents, brokers, auctioneers. |
| Retailers | • analyze the common types of retail stores and give examples of each; include both service and merchandising businesses<br>• describe the types of non-store retailers<br>• analyze future retailing opportunities and how they might effect traditional channels. | Convenience, specialty, discount, department, supermarket, superstore, co-operatives, wholesale warehouse club, catalogue showroom.<br>Mail order, direct selling, telemarketing, automatic vending, network marketing. |


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| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Modes of Transportation | *The student should:*<br>• explain the role transportation plays within the channels of distribution<br>• compare the advantages and disadvantages of the various modes of transportation (cost, accessibility, reliability, in-transit time, flexibility):<br>– rail<br>– road<br>– pipeline<br>– air<br>– water<br>• illustrate the modes of transportation used for a variety of different products<br>• research developments in transportation methods. | For example, canned goods versus fresh flowers from Holland.<br>For example, intermodal containerization with ship, rail, plane, truck. |
| Career Exploration | • analyze a variety of career opportunities in distribution<br>• identify personal interests, talents and experiences as they relate to careers in distribution. | Define key terms related to career path/ladders, entry-level positions, mid-management, management positions. |


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**MODULE MAM3060: SETTING UP A RETAIL STORE**

**Level:** Advanced

**Theme:** Marketing Systems and Strategies

**Prerequisite:** None

**Module Description:** Students develop retail store images, examine potential locations and design store layouts. Students should be given hands-on experience by researching a location for an actual retailing opportunity and design a layout for this retail store. This module focuses on students owning a retail business and learning the necessary steps for success.

**Module Parameters:** No specialized equipment or facilities.

**Supporting Modules:** MAM1010 Management & Marketing Basics
ENT2030 Marketing the Venture
MAM2040 Retail Operations

**Curriculum and Assessment Standards**

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • create an image for a retail business | • a store design project – Part 1:<br>– select a particular type of retail store and create an image for this retail store including a name, identifying target niche, and identification of distinguishing characteristics. | 15 |
| • analyze and justify a location and site | • a store design project – Part 2:<br>– identify a community and a site within the community for the retail store selected in Part 1. | 15 |
| • design an effective floor plan using the principles of store design and layout | • a store design project – Part 3:<br>– design a store front, using layout design principles, for selected retail site in Part 2<br>– design an interior layout, using layout design principles, for selected retail site in Part 2.<br>*Assessment Tool*<br>*Assessment Guide: Designing a Retail Store Project (MAM3060–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 20<br>40 |


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**MODULE MAM3060: SETTING UP A RETAIL STORE** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:*<br>• identify and select vendors for the purchase of fixtures and equipment<br>• prepare a maintenance schedule | *Assessment of student achievement should be based on:*<br>• store design project – Part 4:<br>– prepare a list of vendors to use when ordering furniture, fixtures and equipment for the particular store of choice<br>– prepare a facilities housekeeping schedule for daily cleaning, general maintenance and redecorating.<br>*Assessment Tool*<br>*Assessment Guide: Designing a Retail Store Project (MAM3060–1)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 10 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Creating a Store Image | *The student should:*<br>• describe examples of what creates a favourable image:<br>– store name<br>– targeting your market<br>– quality/price of product and service<br>– retail polices and services (credit, return policies, guarantees). | |
| Choosing a Location | • describe marketing research strategies<br>• describe the type of retail store he or she is interested in opening | See Marketing the Venture (ENT2030). |


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| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| • Selecting a Community<br><br>• Selecting a Site | *The student should:*<br>• identify the kind of community (city/town/district) he or she is looking for<br>• list store location objectives regarding target market, business environment and competition<br>• identify and investigate a preliminary list of communities<br>• compare communities selected, short list and rank<br>• select the best community for the retail business<br>• research various sites within the community<br>• research traffic patterns<br>• research options for location:<br>– compare buying versus leasing<br>– calculate how to best maximize sales<br>– question the site based on store image<br>– analyze large competition versus one-of-a-kind. | |
| Creating a Store/Floor Design | • analyze the:<br>– space required<br>– work flow patterns (employee, customer)<br>– equipment/display/physical arrangement<br>• describe and illustrate how to incorporate:<br>– enticements to customers (come, stay, buy, return)<br>– efficiency/service<br>– flexibility/convenience<br>– safety (employees, customers)<br>– security (merchandise, equipment)<br>– maintenance (day-to-day, repair, remodel)<br>• research the principles of store front and interior floor design and layout (features, impulse goods vs. staple goods, physical arrangement) | |


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| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Creating a Store/Floor Design (continued) | *The student should:*<br>• compare exterior and interior layouts among stores with similar product lines:<br>– supermarket<br>– department<br>– small store<br>– service operation<br>• identify elements that compete for space on the floor<br>• describe/illustrate:<br>– why the plan is functional<br>– selling/non-selling areas<br>– equipment/furniture<br>– decor<br>– image of business (inside/outside). | A background in Design Studies is helpful. |
| Managing Facilities | • prepare housekeeping schedules/work plans:<br>– daily cleaning<br>– general maintenance<br>– redecorating (promotional and upkeep). | |


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**MODULE MAM3070: OFFICE SYSTEMS 2**

**Level:** Advanced

**Theme:** Information Management Systems and Strategies

**Prerequisite:** MAM2050 Office Systems 1

**Module Description:** Students demonstrate effective office environment strategies and processes, use electronic office equipment, and manage processes related to electronic communications and business meetings.

**Module Parameters:** Access to electronic office equipment.

**Curriculum and Assessment Standards**

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • evaluate and make recommendations for improving the quality of the office environment | • a research report that will address:<br>– change processes<br>– job/role descriptions<br>– work plan<br>– training.<br>*Assessment Tool*<br>*Research Process: Office Systems 2 – Office Environments (MAM3070–1)*<br>*Standard*<br>*Rating of 3 in each applicable task* | 20 |
| • demonstrate independent use of office strategies and procedures, and electronic office equipment within office environments | • a practical lab experience in a simulated or actual office. Train others on a minimum of three different electronic office equipment. Show evidence of efficient use of electronic office equipment when training others.<br>*Assessment Tool*<br>*Assessment Task: Office Systems 2 – Practical Lab Experience (MAM3070–2)*<br>*Standard*<br>*Rating of 3 in each applicable task* | 40 |


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**MODULE MAM3070: OFFICE SYSTEMS 2** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • describe procedures for managing electronic communications | • an office manual or demonstration of work experience consisting of policies and procedures for electronic communications equipment including:<br>– telephone<br>– facsimile<br>– electronic mail/Internet.<br>*Assessment Tool*<br>*Presentations/Reports: Office Systems 2 – Electronic Communications (MAM3070–3)*<br>*Standard*<br>*Rating of 3 in each applicable task* | 20 |
| • demonstrate ability to plan and run a business meeting | • a business meeting consisting of:<br>– plan a business meeting<br>– prepare for the meeting<br>– use effective and efficient strategies during the meeting<br>– complete follow-up tasks.<br>*Assessment Tool*<br>*Assessment Task: Office Systems 2 – Business Meetings (MAM3070–4)*<br>*Standard*<br>*Rating of 3 in each applicable task* | 20 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |


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**MODULE MAM3070: OFFICE SYSTEMS 2** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Office Environment | *The student should:*<br>• research the change process within an office as electronic technologies alter the office environment<br>• analyze the changing role of the office worker at the different levels (entry-level, supervisory, top-level management)<br>• research various job descriptions:<br>– responsibilities (direct, indirect)<br>– setting priorities<br>– reporting structure<br>– opportunities for initiative<br>• illustrate the flow of work for one or more office functions<br>• identify strategies to develop skill and train others on a variety of electronic office equipment<br>• compare office manuals for common policies and procedures<br>• propose strategies by which an office could improve the commitment to quality management<br>• implement strategies that increase personal productivity:<br>– time and work management<br>– setting priorities<br>– resource management. | Select from offices of various sizes (e.g., home business, large corporation).<br>Various sectors of the economy (e.g., oil, service industry, legal, real estate, insurance, auto dealership, health services).<br>Telephones, photocopiers, calculators, electronic mail, facsimiles, dictaphones. |


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**MODULE MAM3070: OFFICE SYSTEMS 2** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Procedures for Managing Electronic Communications | *The student should:*<br>• describe the various communication systems available to business:<br>– telephone<br>– voice messaging systems<br>– electronic mail<br>– facsimiles<br>– Internet<br>– teleconferencing<br>• research a variety of communication procedures and protocols that are practised for each system. (e.g., answering phones promptly, delivering fax messages promptly, answering electronic mail messages immediately)<br>• apply efficient communication procedures and protocols when using a variety of electronic office equipment. | |
| Managing Meeting Arrangements | • identify procedures to use when planning a meeting:<br>– formal and informal<br>• describe strategies to use to prepare for the meeting<br>• describe how meetings run effectively and efficiently<br>• describe the procedures to follow after the meeting. | Agenda for a business meeting could be planned around a discussion of the basic competencies within CTS or the Conference Board of Canada's Employability Skills. |
| Professionalism | • demonstrate proper personal grooming and dress appropriate to the office environment<br>• follow ethics and laws regarding the use of electronic office equipment. | For example, copyright laws. |


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**MODULE MAM3080: COMMUNICATION STRATEGIES 3**

**Level:** Advanced

**Theme:** Information Management Systems and Strategies

**Prerequisite:** None

**Module Description:** Students continue to improve basic oral and written communication strategies necessary to efficient and effective management of information. Focus is on technical writing strategies and composing at the computer when preparing formal business reports and proposals.

**Module Parameters:** Access to a computer workstation.

**Supporting Module:** MAM2060 Communication Strategies 2

**Curriculum and Assessment Standards**

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • critique formal technical reports | • reading and critiquing a minimum of two formal technical reports for organization, clarity, completeness and use of proper sentence structure, grammar, spelling and punctuation. Suggest ways the reports could be improved.<br>*Assessment Tool*<br>*Assessment Task: Communication Strategies, Read and Critique Technical Reports (MAMCOM–1)*<br>*Standard*<br>*Rating of 3, all questions answered* | 20 |
| • prepare a formal technical report that is clear, concise and meets the needs of the report user | • composing and formatting a formal technical report in an area of interest. Show evidence that the writing process was followed in its preparation (prewriting, writing, revising and proofreading).<br>*Assessment Tool*<br>*Assessment Guide: Communication Strategies Writing Projects (MAMCOM–2)*<br>*Standard*<br>*Rating of 3 in each applicable tasks* | 60 |


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**MODULE MAM3080: COMMUNICATION STRATEGIES 3** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement will be based on:* | |
| • deliver an oral, formal technical report supported by visual aids | • an oral presentation consisting of a minimum 10-minute presentation of a formal technical report. Show evidence of effective oral communication strategies including use of non-verbal skills and visual aids.<br>*Assessment Tool*<br>*Assessment Guide: Communication Strategies Oral Presentations (MAMCOM–3)*<br>*Standard*<br>*Rating of 3 in all applicable tasks* | 20 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above.* | Integrated throughout |

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Planning to Write Technical Reports | *The student should:*<br>• identify examples of technical writing:<br>– instruction manuals<br>– research reports<br>• describe characteristics of effective technical writing:<br>– directed to topic/need<br>– accurate (terminology, procedures, data)<br>– current, clear, concise and complete<br>• research the parts of a formal technical report:<br>– the cover<br>– title page<br>– table of contents<br>– list of illustrations<br>– synopsis (executive summary)<br>– body of the text (discussion, conclusions, recommendations, footnotes)<br>– appendix<br>– bibliography or reference list<br>– letter of transmittal | Examples of technical writing can be found in every CTS strand. |


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| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Planning to Write Technical Reports (continued) | *The student should:*<br>• identify and demonstrate competencies needed for effective technical writing:<br>– concentration<br>– precision<br>– summarization skills<br>• read and evaluate a variety of technical reports<br>• compare technical writing with other writing; e.g., creative, historigraphical, journalistic. | |
| Writing Effective Technical Reports | • research and follow *prewriting strategies* when preparing formal technical reports:<br>– determine the purpose<br>– prepare an outline<br>– conduct the research<br>– develop a notetaking system<br>– prepare an outline putting all sections together<br>• *compose* the first draft of the formal document using word-processing programs, templates and effective strategies for formal reports such as:<br>– write one section at a time (executive summary being the last section to write)<br>– use headings and side headings for ease of reading<br>• use *revising* strategies such as:<br>– check draft against outline<br>– insure purpose has been achieved<br>– check report is clear, concise and complete<br>– check facts for accuracy<br>• use *proofreading* strategies:<br>– proofread for facts, dates, names, figures and statistical information<br>– proofread for sentence structure, grammar, spelling, punctuation and format. | |


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**MODULE MAM3080: COMMUNICATION STRATEGIES 3** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Oral Communications | *The student should:*<br>• research and critique presentation strategies<br>• identify types of visual aids one can use in a presentation<br>• rehearse making an oral presentation of a formal technical report using visual aids and effective presentation strategies. | Charts, graphs, diagrams, pictures, outlines. |


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**MODULE MAM3090: RECORDS MANAGEMENT 2**

**Level:** Advanced

**Theme:** Information Management Systems and Strategies

**Prerequisites:** MAM2080 Records Management 1
INF1050 Database 1

**Module Description:** Students describe the advantages of an automated records system. Numeric, subject and geographic coding are emphasized.

**Module Parameters:** Access to a computer workstation and database software.

**Curriculum and Assessment Standards**

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • identify and describe basic electronic records management concepts | • a concept test consisting of questions related to:<br>– basic electronic records management systems<br>– subject, numeric and geographical record systems.<br>*Assessment Tool*<br>*Sample Test Items*: Pitman Office Handbook Workbook, *pp. 151–153, on the job activities or* Quick Filing Practice Teachers Manual, *Quiz 5,6,7,8 and Final Test, pp. 25–35.*<br>*Standard*<br>*Rating of 80% or higher on concept test* | 20 |
| • demonstrate ability to plan, create and use two of the following electronic records management systems:<br>– numeric<br>– subject<br>– geographic | • an electronic records management project consisting of numeric, subject and geographic data:<br>– choose records to be managed electronically<br>– identify users of system<br>– plan and organize the system<br>– create the records management systems<br>– use the system to store, retrieve, edit and manipulate records<br>– prepare reports (alphabetic, numeric, subject and geographical) from the system.<br>– recommend ways to improve system.<br>*Assessment Tool*<br>*Assessment Task: Records Management Project (MAM3090–1)*<br>*Records Management Planning Sheet (MAM3090–2)*<br>*Standard*<br>*Rating of 2 in each applicable task with 80% accuracy* | 80 |


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**MODULE MAM3090: RECORDS MANAGEMENT 2** (continued)

| Module Learner Expectations | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:*<br>• demonstrate basic competencies. | *Assessment of student achievement should be based on:*<br>• observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above.* | Integrated throughout |

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Planning and Organizing Electronic Records | *The student should:*<br>• describe and give examples of automated records systems<br>• describe the advantages of the automated records systems over manual systems<br>• research safety and security procedures of automated records<br>• describe the process known as micrographics<br>• research the types of microfilm and their uses<br>– roll film<br>– microfiche<br>– microfilm jacket<br>– aperture cards<br>• identify and describe electronic equipment and supplies necessary to create and maintain an efficient electronic records management system<br>• differentiate between ROM and RAM when creating an electronic records management system. | Working knowledge of database software package may require additional time if the student's software skills are not efficient (see Information Processing Database 1, 2 [INF1050, INF2070]). |


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| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Creating a Subject Records Management System | *The student should:*<br>• identify records that are or should be managed by subject<br>• explain the advantages and disadvantages of subject storage<br>• describe the standard arrangements for subject storage:<br>– straight dictionary arrangement<br>– encyclopedic arrangement<br>• create a subject records management system<br>• practise using the rules for subject filing by indexing, coding and storing a variety of records. | Students can prepare a manual for reference—coding rules. |
| Creating a Numeric Records Management System | • identify records that are or should be managed by number<br>• explain the advantages and disadvantages of numeric storage<br>• describe numeric storage methods:<br>– consecutive numbering methods<br>– non-consecutive numbering or terminal digit methods<br>• explain the differences between consecutive and non-consecutive numeric record storage<br>• describe how records can be stored chronologically<br>• create a numeric records management system<br>• practise using the rules for numeric filing by indexing, coding and storing a variety of records. | |


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**MODULE MAM3090: RECORDS MANAGEMENT 2** (continued)

| Concept | Specific Learner Expectations | Notes |
|---|---|---|
| Creating a Geographic Records Management System | *The student should:*<br>• identify records that are or should be managed by geographic location<br>• explain the advantages and disadvantages of geographic storage<br>• explain the differences and similarities between geographical and alphabetic methods<br>• create a geographic records management system<br>• practise using the rules for geographic filing by indexing, code and store a variety of records. | |
| Storing and Monitoring Records Management Systems | For each records management system created (subject, numeric, and geographical):<br>• store new data or records<br>• retrieve data or records<br>• sort and/or query records<br>• create a report<br>• manipulate and edit records<br>• analyze strategies to prevent records from being mismanaged. | |


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**COURSE MAM3100: PROMOTION: BROADCAST ADVERTISING**

**Level:** Advanced

**Theme:** Marketing Systems and Strategies

**Prerequisite:** None

**Description:** Students are introduced to broadcast communication channels, delivery strategies and advertising media that can be used to inform potential customers about products and services available in the marketplace.

**Parameters:** Access to a cassette player with a microphone and camcorder for broadcast advertising.

**Supporting Course:** MAM1010 Management & Marketing Basics

**Curriculum and Assessment Standards**

| General Outcomes | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:*<br>• investigate and report on basic broadcast media types and concepts | *Assessment of student achievement should be based on:*<br>• a presentation or report consisting of a minimum of three of the following:<br>– types of broadcast media<br>– role of Canadian Radio–television and Telecommunications Commission (CRTC)<br>– brief history of both radio and television<br>– types of ownership of both radio and television<br>– local examples of radio stations and television networks and the types of audiences they attract.<br>*Assessment Tool*<br>*Presentations/Reports: Overview of Broadcast Media (MAM3100–1)*<br>*Standard*<br>*Rating of 2 for each applicable task* | 20 |


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**COURSE MAM3100: PROMOTION: BROADCAST ADVERTISING** (continued)

| General Outcomes | Assessment Criteria and Conditions | Suggested Emphasis |
|---|---|---|
| *The student will:* | *Assessment of student achievement should be based on:* | |
| • evaluate advertisements for radio and television mediums | • an evaluation of advertisements consisting of a collection of three advertisements for each medium (radio and television) which includes:<br>– type of media, target market, objective<br>– effective use of each component or production techniques<br>– how the AIDA concept was used (**A**ttention, **I**nterest, **D**esire, **A**ction).<br>*Assessment Tool*<br>*Assessment Task: Evaluation of Radio and Television Commercials (MAM3100–2)*<br>*Standard*<br>*Three advertisements evaluated for each media, all sections completed* | 30 |
| • design and create an effective promotional advertisement for each of the following media:<br>– television<br>– radio | • a project consisting of:<br>– preplanning of advertisement through use of rough draft, radio script or storyboard<br>– final draft<br>– presentation of the advertisements<br>– self-assessment of created advertisement.<br>*Assessment Tool*<br>*Assessment Guide: Production of Radio Commercials (MAM3100–3)*<br>*Assessment Guide: Production of Television Commercials (MAM3100–4)*<br>*Standard*<br>*Rating of 2 in each applicable task* | 50 |
| • demonstrate basic competencies. | • observations of individual effort and interpersonal interaction during the learning process.<br>*Assessment Tool*<br>*Basic Competencies Reference Guide and any assessment tools noted above* | Integrated throughout |


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**COURSE MAM3100: PROMOTION: BROADCAST ADVERTISING** (continued)

| Concept | Specific Outcomes | Notes |
|---|---|---|
| Overview of Broadcast Media | *The student should:*<br>• describe the types of broadcast advertising<br>• describe the role of the CRTC<br>• describe the history of both radio and television<br>• explain the types of ownership and programming found in radio and television<br>• identify a variety of radio stations available to the various listeners in the immediate area<br>• describe the types of television stations:<br>– network-affiliated<br>– network-owned<br>– independent<br>• describe other means of television advertising such as cablevision, pay-TV, videocassette recordings, satellite, infomercials. | Radio, television. |
| Advertising on Radio | • analyze radio advertising including:<br>– radio time slots<br>– effectiveness of commercial<br>• identify and calculate the cost of radio commercials in various time slots<br>• identify elements involved in preparation of a radio commercial<br>• demonstrate the use of radio production techniques when planning and producing a radio commercial<br>• present and evaluate own radio commercial. | Use of AIDA concept: attract attention, create interest, stimulate desire, induce action.<br>Analyze radio ads: e.g., script types, live versus taped, length, repetition, voices. |


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**COURSE MAM3100: PROMOTION: BROADCAST ADVERTISING** (continued)

| Concept | Specific Outcomes | Notes |
|---|---|---|
| Advertising on Television | *The student should:*<br>• analyze television commercials including:<br>– time slots<br>– effectiveness of the commercial<br>• identify and calculate the costs of television commercials in various time slots<br>• demonstrate the use of television production techniques when planning and producing a television commercial:<br>– storyboard preparation<br>– use of equipment<br>• present and evaluate own television commercial. | Use of AIDA concept: attract attention, create interest, stimulate desire, induce action.<br>Camcorder-types and lengths of shots, lighting, production sequence. |


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# MANAGEMENT AND MARKETING

## SECTION G: ASSESSMENT TOOLS

The following pages comprise background information and strategies for assessing student achievement and the assessment tools that are listed in Sections D, E and F of this Guide.

This section of the Guide to Standards and Implementation has been designed to provide a common base of understanding about the level of competencies students are expected to demonstrate to successfully complete a course. The goal is to establish assessment standards for junior and senior high school students that are fair, credible and challenging.

These tools will assist teachers throughout the province to more consistently assess student achievement. The purpose of expanding on the assessment standards is to:

- increase confidence among students, parents, business/ industry and post-secondary that students can demonstrate the competencies specified in the courses they have completed
- encourage fairness and equity in how students' efforts are judged
- enable learners to focus effort on key learnings
- support teachers and community partners in planning and implementing CTS.

These tools were validated during the optional stage of CTS implementation.


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## ASSESSING STUDENT ACHIEVEMENT IN CTS

The CTS assessment standards assess two basic forms of competency:

- What can a student *do*?
  - **make** a product (e.g., wood bowl, report, garment)
  - **demonstrate** a process
    - strand-related competencies (e.g., keyboarding, hair cutting, sewing techniques, lab procedures)
    - basic competencies (e.g., resource use, safety procedures, teamwork).

- What does a student *know*?
  - knowledge base needed to demonstrate a competency (link theory and practice).

### CTS Defines *Summative* Assessment Standards

The assessment standards and tools defined for the CTS courses, referenced in Sections D, E and F of this Guide, focus on the final (or summative) assessment of student achievement.

Assessment throughout the learning period (formative assessment) will continue to evaluate how students are progressing. Teachers direct and respond to students' efforts to learn—setting and marking tasks and assignments, indicating where improvement is needed, sending out interim reports, congratulating excellence, etc.

Teachers will decide which instructional and assessment strategies to apply during the formative learning period. As formative and summative assessment are closely linked, some teachers may wish to modify the tools included in this section to use during the instructional process. Teachers may also develop their own summative assessment tools as long as the standards are consistent with the minimum expectations outlined by Alberta Learning.

### Grading and Reporting Student Achievement

When a student can demonstrate ALL of the exit-level competencies defined for the course (course learner expectations), the teacher will designate the course as "successfully completed." The teacher will then use accepted grading practices to determine the percentage grade to be given for the course—a mark not less than 50%.

The time frame a teacher allows a student to develop the exit-level competency is a local decision. NOTE: The *Guide to Education: ECS to Grade 12* specifies that students must have access to 25 hours of instruction for each credit. Students may, however, attain the required competencies in less time and may proceed to other courses.

Teachers are encouraged to consult their colleagues to ensure grading practices are as consistent as possible. Further information about assessing and reporting student achievement in CTS is provided in the *CTS Manual for Administrators, Counsellors & Teachers* (Assessing Student Achievement).

### Components of Assessment Standards in CTS

The following components are included in each course:

- **general outcomes** (in the shaded left column of the course) define the exit-level competencies students are expected to achieve to complete a course. Each general outcome defines and describes critical behaviours that can be measured and observed. The student must meet the standard specified for **ALL** general outcomes within a course to be successful.

- **suggested emphasis** (in the right column of the course) provides a guideline for the relative significance of each general outcome and can be used to organize for instruction.


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- **criteria and conditions** (in the middle column of the module) set the framework for the assessment of student competency, specifying the minimum standard for performance and including a reference to assessment tools, where appropriate.

  *Criteria* define the behaviours that a student must demonstrate to meet the designated standard. For example, the criteria could describe the various techniques that must be demonstrated when using a tool, and/or describe the minimum components of a project the student must complete.

  *Conditions* outline the specifications under which a student's competency can be judged. For example, the conditions could specify whether the assessment should be timed or not, or if the student should be allowed to access to support resources or references.

  *Standard* may be defined by (1) assessment tools, which are referenced in this section (or sometimes in approved learning resources) and/or (2) "illustrative examples" of student work, if appropriate.

  *Assessment Tools* included in this section of the Guide tend to be of two types:

  - tools generic to a strand or to the entire CTS program; e.g., a standard five-point rating scale is used in all strands. Other generic tools include assessing reports and presentations and lab safety checklists. (*Names of these tools include the strand code [e.g., "INF" for Information Processing] and a code for the type of tool [e.g., "TDENT" for Text-Data Entry].)*
  - tools specific to a module; e.g., assessment checklist for assessing a venture plan in Enterprise and Innovation or a checklist for sketching, drawing and modelling in Design Studies. *(Names of these tools include the module code; e.g., "INF1010–1" indicating that it is the first module-specific tool used in Information Processing Module 1010.)*

**Development and Validation Processes**

The "Criteria and Conditions" and "Suggested Emphasis" columns have been validated with extensive input from teachers, professional associations/contacts and post-secondary institutions. The goal was to prepare well-structured assessment standards and related assessment tools that:

- establish an appropriate level of challenge and rigour
- relate directly to the type of learning described in the curriculum standard
- are easy to understand
- are efficient to implement
- can provide a consistent measure of what was expected to be measured.

As students and teachers work with the assessment standards and tools, it is expected that levels of performance will increase as more and more students are able to achieve the minimum standard. Therefore, the assessment standards and related tools will continue to be monitored, and revised as necessary to ensure appropriate levels or rigour and challenge, and successful transitions for students as they leave high school and enter the workplace or related post-secondary programs.


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## ASSESSING STUDENT ACHIEVEMENT IN MANAGEMENT AND MARKETING

Much of the assessment in Management and Marketing consists of gathering information about what a student knows and is able to do and being able to compare those outcomes with the standards identified within the curriculum.

Assessing student performance in Management and Marketing values process as well as product. The focus is primarily on the student's ability to apply knowledge and skills to complete a given task rather than the simple acquisition of knowledge and skills.

### Assessment Strategies and Tools

A variety of tools have been provided for your reference and use. In the development of the assessment materials there has been an attempt to keep it as simple as possible while also providing guidance and assistance to the teacher. The tools are intended to help you assess students' work as accurately and consistently as possible by stating standards of performance for elements felt to be important within the curriculum as a whole or in specific modules. They also provide standards for "basic competencies" students should be able to demonstrate while engaged in learning.

The tools that have been developed are intended to be used as summative assessment tools. Depending on the way the classroom is organized, they may be used when the student has indicated he or she is ready for the final assessment or by the entire class at the end of the learning period.

### Tools Generic to CTS

The generic rating scale has been used to develop several of the tools in CTS. A generic framework for assessing the processes CTS students apply in completing a task or project is included in this section. It is based on the notion that students will follow a process as they work through their projects and that this process has a number of sequential steps. The framework shows the increasing expectations from the introductory, to the intermediate, to the advanced level.

### Tools Generic to Management and Marketing

Career exploration is integrated throughout the Management and Marketing strand and is assessed using a dedicated tool. The generic Career Profile tool (MAMCARE) has been designed to allow students to report their research on the tool itself with ease and efficiency.

In addition, the Information Management theme presents three generic tools related to the Communication Strategies 1, 2 and 3 modules (MAMCOM–1, 2, 3). These tools are useful in showing the continuity and progression of learning throughout these modules. As well, the generic Information Processing tool for Workstation Routines and Management (INFWRKSTA) has been incorporated into modules requiring technology and/or office work related activities

### Tools Specific to Management and Marketing

Most tools that have been developed to assess specific MLEs in a module and are labelled with the module number and the tool number (e.g., MAM1020–2). They are referred to under the conditions and criteria section for each module.

The assessment tools outline the criteria for assessment and the minimum task performance rating using a five-point scale. These standards establish an appropriate level of performance and achievement for one or more module learner expectations. A number of tools have been set up for student use and the standard is simplified by requiring students to complete all sections of the task outlined; e.g., MAM2020–5, MAM3050–1).

A number of module-specific assessment tools have been developed around the frameworks generic to CTS and the strand. These tools identify basic as well as strand-specific skill sets such as:

- Planning and Management
- Information Gathering and Processing
- Presenting/Reporting
- Collaboration and Teamwork.


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As students and teachers work with the assessment standards and tools, it is expected that levels of performance will increase as more and more students are able to achieve the minimum standard. Therefore, the assessment standards and related tools will continue to be monitored, and revised as necessary to ensure appropriate levels of rigour and challenge, and successful transitions for students as they leave high school and enter the workplace or post-secondary programs.


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# BASIC COMPETENCIES REFERENCE GUIDE

The chart below outlines basic competencies that students endeavour to develop and enhance in each of the CTS strands and modules. Students' basic competencies should be assessed through observations involving the student, teacher(s), peers and others as they complete the requirements for each module. In general, there is a progression of task complexity and student initiative as outlined in the Developmental Framework★. **As students progress through Stages 1, 2, 3 and 4 of this reference guide, they build on the competencies gained in earlier stages**. Students leaving high school should set themselves a goal of being able to demonstrate Stage 3 performance.

*Suggested strategies for classroom use include:*

- having students rate themselves and each other
- using in reflective conversation between teacher and student
- highlighting areas of strength
- tracking growth in various CTS strands
- highlighting areas upon which to focus
- maintaining a student portfolio.

| **Stage 1**— *The student:* | **Stage 2**— *The student:* | **Stage 3**— *The student:* | **Stage 4**— *The student:* |
|---|---|---|---|
| **Managing Learning** | | | |
| ☐ comes to class prepared for learning | ☐ → | ☐ → | ☐ → |
| ☐ follows basic instructions, as directed | ☐ follows instructions, with limited direction | ☐ follows detailed instructions on an independent basis | ☐ → |
| | ☐ sets goals and establishes steps to achieve them, with direction | ☐ sets clear goals and establishes steps to achieve them | ☐ demonstrates self-direction in learning, goal setting and goal achievement |
| ☐ acquires specialized knowledge, skills and attitudes | ☐ applies specialized knowledge, skills and attitudes in practical situations | ☐ transfers and applies specialized knowledge, skills and attitudes in a variety of situations | ☐ transfers and applies learning in new situations; demonstrates commitment to lifelong learning |
| ☐ identifies criteria for evaluating choices and making decisions | ☐ identifies and applies a range of effective strategies for solving problems and making decisions | ☐ uses a range of critical thinking skills to evaluate situations, solve problems and make decisions | ☐ thinks critically and acts logically to evaluate situations, solve problems and make decisions |
| ☐ uses a variety of learning strategies | ☐ explores and uses a variety of learning strategies, with limited direction | ☐ selects and uses effective learning strategies | ☐ → |
| | | ☐ cooperates with others in the effective use of learning strategies | ☐ provides leadership in the effective use of learning strategies |
| **Managing Resources** | | | |
| ☐ adheres to established timelines; uses time/schedules/planners effectively | ☐ creates and adheres to timelines, with limited direction; uses time/schedules/planners effectively | ☐ creates and adheres to detailed timelines on an independent basis; prioritizes task; uses time/schedules/planners effectively | ☐ creates and adheres to detailed timelines; uses time/schedules/planners effectively; prioritizes tasks on a consistent basis |
| ☐ uses information (material and human resources), as directed | ☐ accesses and uses a range of relevant information (material and human resources), with limited direction | ☐ accesses a range of information (material and human resources), and recognizes when additional resources are required | ☐ uses a wide range of information (material and human resources) in order to support and enhance the basic requirement |
| ☐ uses technology (facilities, equipment, supplies), as directed, to perform a task or provide a service | ☐ uses technology (facilities, equipment, supplies), as appropriate, to perform a task or provide a service, with minimal assistance and supervision | ☐ selects and uses appropriate technology (facilities, equipment, supplies) to perform a task or provide a service on an independent basis | ☐ recognizes the monetary and intrinsic value of managing technology (facilities, equipment, supplies) |
| ☐ maintains, stores and/or disposes of equipment and materials, as directed | ☐ maintains, stores and/or disposes of equipment and materials, with limited assistance | ☐ maintains, stores and/or disposes of equipment and materials on an independent basis | ☐ demonstrates effective techniques for managing facilities, equipment and supplies |
| **Problem Solving and Innovation** | | | |
| ☐ participates in problem solving as a process<br>☐ learns a range of problem-solving skills and approaches | ☐ identifies the problem and selects an appropriate problem-solving approach, responding appropriately to specified goals and constraints | ☐ thinks critically and acts logically in the context of problem solving | ☐ identifies and resolves problems efficiently and effectively |
| ☐ practices problem-solving skills by responding appropriately to a clearly defined problem, specified goals and constraints, by:<br>– generating alternatives<br>– evaluating alternatives<br>– selecting appropriate alternative(s)<br>– taking action | ☐ applies problem-solving skills to a directed or a self-directed activity, by:<br>– generating alternatives<br>– evaluating alternatives<br>– selecting appropriate alternative(s)<br>– taking action | ☐ transfers problem-solving skills to real-life situations, by generating new possibilities<br>☐ prepares implementation plans<br>☐ recognizes risks | ☐ identifies and suggests new ideas to get the job done creatively, by:<br>– combining ideas or information in new ways<br>– making connections among seemingly unrelated ideas<br>– seeking out opportunities in an active manner |


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| **Stage 1**— *The student:* | **Stage 2**— *The student:* | **Stage 3**— *The student:* | **Stage 4**— *The student:* |
|---|---|---|---|
| **Communicating Effectively** | | | |
| ☐ uses communication skills; e.g., reading, writing, illustrating, speaking | ☐ communicates thoughts, feelings and ideas to justify or challenge a position, using written, oral and/or visual means | ☐ prepares and effectively presents accurate, concise, written, visual and/or oral reports providing reasoned arguments | ☐ negotiates effectively, by working toward an agreement that may involve exchanging specific resources or resolving divergent interests |
| ☐ uses language in appropriate context | ☐ uses technical language appropriately | ☐ encourages, persuades, convinces or otherwise motivates individuals | ☐ negotiates and works toward a consensus |
| ☐ listens to understand and learn | ☐ listens and responds to understand and learn | ☐ listens and responds to understand, learn and teach | ☐ listens and responds to understand, learn, teach and evaluate |
| ☐ demonstrates positive interpersonal skills in selected contexts | ☐ demonstrates positive interpersonal skills in many contexts | ☐ demonstrates positive interpersonal skills in most contexts | ☐ promotes positive interpersonal skills among others |
| **Working with Others** | | | |
| ☐ fulfills responsibility in a group project | ☐ → | ☐ seeks a team approach, as appropriate, based on group needs and benefits; e.g., idea potential, variety of strengths, sharing of workload | ☐ leads, where appropriate, mobilizing the group for high performance |
| ☐ works collaboratively in structured situations with peer members | ☐ cooperates to achieve group results | ☐ works in a team or group:<br>– encourages and supports team members<br>– helps others in a positive manner<br>– provides leadership/ followership as required<br>– negotiates and works toward consensus as required | ☐ understands and works within the context of the group |
| ☐ acknowledges the opinions and contributions of others in the group | ☐ maintains a balance between speaking, listening and responding in group discussions<br>☐ respects the feelings and views of others | | ☐ prepares, validates and implements plans that reveal new possibilities |
| **Demonstrating Responsibility** | | | |
| **Attendance** | | | |
| ☐ demonstrates responsibility in attendance, punctuality and task completion | ☐ → | ☐ → | ☐ → |
| **Safety** | | | |
| ☐ follows personal and environmental health and safety procedures | ☐ recognizes and follows personal and environmental health and safety procedures | ☐ establishes and follows personal and environmental health and safety procedures | ☐ transfers and applies personal and environmental health and safety procedures to a variety of environments and situations |
| ☐ identifies immediate hazards and their impact on self, others and the environment | ☐ identifies immediate and potential hazards and their impact on self, others and the environment | ☐ → | ☐ → |
| ☐ follows appropriate/emergency response procedures | ☐ → | ☐ → | ☐ → |
| | | | ☐ demonstrates accountability for actions taken to address immediate and potential hazards |
| **Ethics** | | | |
| ☐ makes personal judgements about whether or not certain behaviours/actions are right or wrong | ☐ assesses how personal judgements affect other peer members and/or family; e.g., home and school | ☐ assesses the implications of personal/group actions within the broader community; e.g., workplace | ☐ analyzes the implications of personal/group actions within the global context<br>☐ states and defends a personal code of ethics as required |

| ★**Developmental Framework** | | | |
|---|---|---|---|
| • *Simple task*<br>• *Structured environment*<br>• *Directed learning* | • *Task with limited variables*<br>• *Less structured environment*<br>• *Limited direction* | • *Task with multiple variables*<br>• *Flexible environment*<br>• *Self-directed learning, seeking assistance as required* | • *Complex task*<br>• *Open environment*<br>• *Self-directed/self-motivated* |


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## GENERIC RATING SCALE

| SCALE | RUBRIC STATEMENT (included in assessment tool/statements; in *italics* are optional) *The student:* | IS TASK/ PROJECT COMPLETED? | PROBLEM SOLVING: STUDENT INITIATIVE VS TEACHER DIRECTION/ SUPPORT | USE OF TOOLS, MATERIALS, PROCESSES | *STANDARDS OF QUALITY/ PRODUCTIVITY* | *TEAMWORK LEADERSHIP* | *SERVICE CLIENT/ CUSTOMER* |
|---|---|---|---|---|---|---|---|
| **4** | exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. *Quality, particularly details and finishes, and productivity are consistent and exceed standards. Leads others to contribute team goals. Analyzes and provides effective client/customer services beyond expectations.* | Exceeds defined outcomes. | Plans and solves problems effectively and creatively in a self-directed manner. | Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. | *Quality, particularly details and finishes, and productivity are consistent and exceed standards.* | *Leads others to contribute team goals.* | *Analyzes and provides effective client/customer services beyond expectations.* |
| **3** | meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. *Quality and productivity are consistent. Works cooperatively and contributes ideas and suggestions that enhance team effort. Analyzes and provides effective client/customer services.* | Meets defined outcomes. | Plans and solves problems in a self-directed manner. | Tools, materials and/or processes are selected and used efficiently and effectively. | *Quality and productivity are consistent.* | *Works cooperatively and contributes ideas and suggestions that enhance team effort.* | *Analyzes and provides effective client/customer services.* |
| **2** | meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. *Quality and productivity are reasonably consistent. Works cooperatively to achieve team goals. Identifies and provides customer/client services.* | Meets defined outcomes. | Plans and solves problems with limited assistance. | Tools, materials and/or processes are selected and used appropriately. | *Quality and productivity are reasonably consistent.* | *Works cooperatively to achieve team goals.* | *Identifies and provides customer/client services.* |
| **1** | meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. *Quality and productivity are reasonably consistent. Works cooperatively. Provides a limited range of customer/client services.* | Meets defined outcomes. | Follows a guided plan of action. | A limited range of tools, materials and/or processes are used appropriately. | *Quality and productivity are reasonably consistent.* | *Works cooperatively.* | *Provides a limited range of customer/client services.* |
| **0** | has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. | Has not completed defined outcomes. | | Tools, materials and/or processes are used inappropriately. | | | |


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| INTRODUCTORY | INTERMEDIATE | ADVANCED |
|---|---|---|
| *The student:* | *The student:* | *The student:* |
| **Preparation and Planning** | **Preparation and Planning** | **Preparation and Planning** |
| • accurately describes an issue on which people disagree | • accurately describes an issue on which people disagree, explaining areas of disagreement | • accurately describes an issue on which people disagree, explaining specific causes of disagreement |
| • poses an important question regarding the issue | • poses one or more thoughtful questions regarding the issue | • poses thoughtful questions regarding the issue |
| • accesses basic in-school/community information sources regarding the issue | • accesses a range of relevant in-school/community resources | • accesses a range of relevant information sources and recognizes when additional information is required |
| • uses one or more information-gathering techniques | • uses a range of information-gathering techniques | • demonstrates resourcefulness in collecting data |
| **Analyzing Perspectives** | **Analyzing Perspectives** | **Analyzing Perspectives** |
| • clarifies different points of view regarding the issue; *e.g., social, economic, environmental* | • categorizes different points of view regarding the issue; *e.g., cultural, ethical, economic, environmental, health-related* | • categorizes different points of view regarding the issue; *e.g., cultural, ethical, economic, environmental, health-related, scientific, political* |
| • states a position on the issue and logical reasons for adopting that position | • states a position on the issue and logical reasons for adopting that position | • states a position on the issue and insightful reasons for adopting that position |
| • states an opposing position on the issue and logical reasons for adopting that position | • states two or more opposing positions on the issue and logical reasons for adopting each position | • states three or more opposing positions on the issue and thoughtful reasons for adopting each position |
| • identifies sources of conflict among different positions | • describes interrelationships among different perspectives/ points of view | • analyzes interrelationships among different perspectives/ points of view |
| • distinguishes between fact and fiction/opinion/theory | • determines accuracy/currency/reliability of information and ideas | • recognizes underlying bias/assumptions/values in information and ideas |
| **Collaboration and Teamwork** | **Collaboration and Teamwork** | **Collaboration and Teamwork** |
| • shares work appropriately among group members | • shares work appropriately among group members | • shares work appropriately among group members |
| • respects the views of others | • respects and considers the views of others | • respects and considers the views of others |
| | • negotiates solutions to problems | • negotiates with sensitivity solutions to problems |
| **Evaluating Choices/Making Decisions** | **Evaluating Choices/Making Decisions** | **Evaluating Choices/Making Decisions** |
| • identifies useful alternatives regarding the issue | • identifies important and appropriate alternatives regarding the issue | • describes in detail important and appropriate alternatives regarding the issue |
| • establishes criteria for assessing each alternative; *e.g., social, economic, environmental* | • establishes knowledge- and value-based criteria for assessing each alternative; *e.g., social, economic, environmental* | • establishes knowledge- and value-based criteria for assessing each alternative; *e.g., social, economic, environmental* |
| • selects an appropriate alternative based on established criteria | • selects an appropriate alternative by showing differences among choices | • selects an appropriate and useful alternative by showing differences among choices |
| • reflects on strengths/weaknesses of decisions by considering consequences | • assesses strengths/weaknesses of decisions by considering consequences | • assesses strengths/weaknesses of decisions by considering consequences and implications |
| • communicates information in a logical sequence to justify choices/decisions made | • communicates ideas in a logical sequence with supporting detail to justify choices/decisions made | • communicates thoughts/feelings/ideas clearly to justify choices/decisions made |


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| INTRODUCTORY | INTERMEDIATE | ADVANCED |
|---|---|---|
| *The student:* | *The student:* | *The student:* |
| **Management**<br>• prepares self for task<br>• organizes and works in an orderly manner<br>• carries out instructions accurately<br>• uses time effectively | **Management**<br>• prepares self for task<br>• organizes and works in an orderly manner<br>• interprets and carries out instructions accurately<br>• plans and uses time effectively<br>• adheres to routine procedures | **Management**<br>• prepares self for task<br>• organizes and works in an orderly manner<br>• interprets and carries out instructions accurately<br>• plans and uses time effectively in a logical sequence<br>• displays leadership in adhering to routine procedures<br>• attempts to solve problems prior to requesting help |
| **Teamwork**<br>• cooperates with group members<br>• shares work appropriately among group members | **Teamwork**<br>• cooperates with group members<br>• shares work appropriately among group members<br>• negotiates solutions to problems | **Teamwork**<br>• cooperates with group members<br>• shares work appropriately among group members<br>• negotiates with sensitivity solutions to problems<br>• displays effective communication skills |
| **Use of Equipment and Materials**<br>• selects and uses appropriate equipment/materials<br>• follows safe procedures/techniques<br>• weighs and measures accurately<br>• returns clean equipment/materials to storage areas | **Use of Equipment and Materials**<br>• selects and uses appropriate equipment/materials<br>• models safe procedures/techniques<br>• weighs and measures accurately<br>• practises proper sanitation procedures<br>• minimizes waste of materials<br>• advises of potential hazards and necessary repairs | **Use of Equipment and Materials**<br>• selects and uses equipment/materials independently<br>• demonstrates concern for safe procedures/techniques<br>• weighs and measures accurately and efficiently<br>• practises proper sanitation procedures<br>• minimizes waste of materials<br>• anticipates potential hazards and emergency response |
| **Investigative Techniques**<br>• gathers and applies information from at least one source<br>• makes predictions that can be tested<br>• sets up and conducts experiments to test a prediction<br>• distinguishes between manipulated/responding variables<br>• obtains results that can be used to determine if some aspect of the prediction is accurate<br>• summarizes important experimental outcomes | **Investigative Techniques**<br>• gathers and applies information from a variety of sources<br>• makes predictions that can be tested<br>• plans, sets up and conducts experiments to test a prediction<br>• identifies and explains manipulated/responding variables<br>• obtains accurate results that confirm/reject the prediction<br>• summarizes and applies experimental outcomes | **Investigative Techniques**<br>• uses relevant information to explain observations<br>• makes predictions that can be tested<br>• plans, sets up and conducts experiments to test a prediction<br>• analyzes relationships among manipulated/responding variables<br>• obtains accurate results that confirm/reject prediction and answer related questions<br>• summarizes, applies and evaluates experimental outcomes |


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| INTRODUCTORY | INTERMEDIATE | ADVANCED |
|---|---|---|
| *The student:* | *The student:* | *The student:* |
| **Preparation and Planning** | **Preparation and Planning** | **Preparation and Planning** |
| • accurately describes an issue on which people disagree | • accurately describes an issue on which people disagree, explaining areas of disagreement | • accurately describes an issue on which people disagree, explaining specific causes of disagreement |
| • poses an important question regarding the issue | • poses one or more thoughtful questions regarding the issue | • poses thoughtful questions regarding the issue |
| • accesses basic in-school/community information sources regarding the issue | • accesses a range of relevant in-school/community resources | • accesses a range of relevant information sources and recognizes when additional information is required |
| • uses one or more information-gathering techniques | • uses a range of information-gathering techniques | • demonstrates resourcefulness in collecting data |
| **Analyzing Perspectives** | **Analyzing Perspectives** | **Analyzing Perspectives** |
| • states a position on the issue and logical reasons for adopting that position | • states a position on the issue and logical reasons for adopting that position | • states a position on the issue and insightful reasons for adopting that position |
| • explains why the issue is important by presenting examples of possible consequences | • explains why the issue is important by presenting examples of possible consequences | • explains why the issue is important by presenting examples of possible consequences and implications |
| • clarifies different points of view regarding the issue; *e.g., social, economic, environmental* | • categorizes different points of view regarding the issue; *e.g., cultural, ethical, economic, environmental, health-related* | • categorizes different points of view regarding the issue; *e.g., cultural, ethical, economic, environmental, health-related, scientific, political* |
| • distinguishes between fact and fiction/opinion/theory | • determines accuracy/currency/reliability of information and ideas | • recognizes underlying bias/assumptions/values in information and ideas |
| **Collaboration and Teamwork** | **Collaboration and Teamwork** | **Collaboration and Teamwork** |
| • works with a range of peer members | • works with a range of peer members | • works with a wide range of peer members |
| • shares information/opinions/suggestions through group discussion | • shares information/opinions/suggestions, maintaining a balance between speaking and listening | • shares information/opinions/suggestions, maintaining a balance between speaking and listening |
| • listens to and respects the views of others | • listens to and respects the views of others, requesting clarification as necessary from other group members | • listens to and respects the views of others, requesting clarification as necessary from other group members |
| **Negotiating and Debating** | **Negotiating and Debating** | **Negotiating and Debating** |
| • presents a convincing argument in logical sequence supporting a position adopted on the issue | • presents a convincing argument in logical sequence supporting a position adopted, conveying points in order of importance | • presents a convincing argument in logical sequence supporting a position adopted, conveying points in order of importance and backing each with sound evidence |
| • provides a relevant response to opposing arguments | • provides a relevant and convincing response to opposing arguments | • provides a relevant and convincing rebuttal to opposing arguments |
| • speaks clearly so the argument can be understood | • speaks clearly without hesitation so the argument can be understood | • speaks clearly without hesitation so the argument can be understood by all listeners |
| • establishes a shared understanding of key alternatives and consequences relevant to the issue | • negotiates a shared agreement on preferred alternatives relevant to the issue | • negotiates a shared agreement on preferred alternatives by resolving divergent points of view |


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| INTRODUCTORY | INTERMEDIATE | ADVANCED |
|---|---|---|
| *The student:* | *The student:* | *The student:* |
| **Preparation and Planning**<br>• sets goals and follows instructions accurately<br>• responds to directed questions and follows necessary steps to find answers<br>• accesses basic in-school/community information sources<br>• interprets and organizes information into a logical sequence<br>• records information accurately, using correct technical terms<br>• uses time effectively | **Preparation and Planning**<br>• sets goals and describes steps to achieve them<br>• uses personal initiative to formulate questions and find answers<br>• accesses a range of relevant in-school/community resources<br>• interprets, organizes and combines information into a logical sequence<br>• records information accurately with appropriate supporting detail and using correct technical terms<br>• plans and uses time effectively<br>• gathers and responds to feedback regarding approach to task and project status | **Preparation and Planning**<br>• sets goals and describes steps to achieve them<br>• uses personal initiative to formulate questions and find answers<br>• accesses a range of relevant information sources and recognizes when additional information is required<br>• interprets, organizes and combines information in creative and thoughtful ways<br>• records information accurately, using appropriate technical terms and supporting detail<br>• plans and uses time effectively, prioritizing tasks on a consistent basis<br>• assesses and refines approach to task and project status based on feedback and reflection |
| **Presentation**<br>• demonstrates effective use of at least one medium of communication:<br>*e.g.,* <u>Written</u>: *spelling, punctuation, grammar, basic format*<br><u>Oral</u>: *voice projection, body language*<br><u>Audio-visual</u>: *techniques, tools*<br>• uses correct grammatical convention and technical terms through proofreading/editing<br>• provides an introduction that describes the purpose of the project<br>• communicates information in a logical sequence<br>• states a conclusion based on a summary of facts<br>• provides a reference list of three or more basic information sources | **Presentation**<br>• demonstrates effective use of at least two communication media:<br>*e.g.,* <u>Written</u>: *spelling, punctuation, grammar, format (formal/informal)*<br><u>Oral</u>: *voice projection, body language, appearance*<br><u>Audio-visual</u>: *techniques, tools, clarity*<br>• maintains acceptable grammatical and technical standards through proofreading and editing<br>• provides an introduction that describes the purpose and scope of the project<br>• communicates ideas into a logical sequence with sufficient supporting detail<br>• states a conclusion by synthesizing the information gathered<br>• provides a reference list that includes five or more relevant information sources | **Presentation**<br>• demonstrates effective use of a variety of communication media:<br>*e.g.,* <u>Written</u>: *spelling, punctuation, grammar, format (formal/informal, technical/literary)*<br><u>Oral</u>: *voice projection, body language, appearance, enthusiasm, evidence of prior practice*<br><u>Audio-visual</u>: *techniques, tools, clarity, speed and pacing*<br>• maintains acceptable grammatical and technical standards through proofreading and editing<br>• provides an introduction that describes the purpose and scope of the project<br>• communicates thoughts/feelings/ideas clearly to justify or challenge a position<br>• states a conclusion by analyzing and synthesizing the information gathered<br>• gives evidence of adequate research through a reference list including seven or more relevant information sources |


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| INTRODUCTORY | INTERMEDIATE | ADVANCED |
|---|---|---|
| *The student:* | *The student:* | *The student:* |
| **Preparation and Planning**<br>• sets goals and follows instructions accurately<br>• adheres to established timelines<br>• responds to directed questions and follows necessary steps to find answers<br>• uses time effectively | **Preparation and Planning**<br>• sets goals and establishes steps to achieve them<br>• creates and adheres to useful timelines<br>• uses personal initiative to formulate questions and find answers<br>• plans and uses time effectively | **Preparation and Planning**<br>• sets clear goals and establishes steps to achieve them<br>• creates and adheres to detailed timelines<br>• uses personal initiative to formulate questions and find answers<br>• plans and uses time effectively, prioritizing tasks on a consistent basis |
| **Information Gathering and Processing**<br>• accesses basic in-school/community information sources<br>• uses one or more information-gathering techniques<br>• interprets and organizes information in a logical sequence<br>• records information accurately, using correct technical terms<br>• distinguishes between fact and fiction/opinion/theory<br>• responds to feedback when current approach is not working | **Information Gathering and Processing**<br>• accesses a range of relevant in-school/community resources<br>• uses a range of information-gathering techniques<br>• interprets, organizes and combines information into a logical sequence<br>• records information accurately with appropriate supporting detail and using correct technical terms<br>• determines accuracy/currency/reliability of information sources<br>• gathers and responds to feedback regarding approach to the task | **Information Gathering and Processing**<br>• accesses a range of relevant information sources and recognizes when additional information is required<br>• demonstrates resourcefulness in collecting data<br>• interprets, organizes and combines information in creative and thoughtful ways<br>• records information accurately with appropriate supporting detail and using correct technical terms<br>• recognizes underlying bias/assumptions/values in information sources<br>• assesses and refines approach to the task and project status based on feedback and reflection |
| **Collaboration and Teamwork**<br>• cooperates with group members<br>• shares work appropriately among group members | **Collaboration and Teamwork**<br>• cooperates with group members<br>• shares work appropriately among group members<br>• negotiates solutions to problems | **Collaboration and Teamwork**<br>• cooperates with group members<br>• shares work appropriately among group members<br>• negotiates with sensitivity solutions to problems<br>• displays effective communication and leadership skills |
| **Information Sharing**<br>• demonstrates effective use of one or more communication media; *e.g., written, oral, audio-visual*<br>• communicates information in a logical sequence<br>• uses correct grammatical convention and technical terms<br>• cites three or more basic information sources | **Information Sharing**<br>• demonstrates effective use of two or more communication media; *e.g., written, oral, audio-visual*<br>• communicates ideas in a logical sequence with sufficient supporting detail<br>• maintains acceptable grammatical and technical standards<br>• cites five or more relevant information sources | **Information Sharing**<br>• demonstrates effective use of a variety of communication media; *e.g., written, oral, audio-visual*<br>• communicates thoughts/feelings/ideas clearly to justify or challenge a position<br>• maintains acceptable grammatical and technical standards<br>• gives evidence of adequate information gathering by citing seven or more relevant information sources |


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## ASSESSMENT CHECKLIST: WORKSTATION ROUTINES AND MANAGEMENT — INFWRKSTN

STUDENT : _____ MODULE: MAM_____

| STANDARD | Students working **at standard** must demonstrate the technique requirements outlined in the checklists below. The columns to the left of the checklists indicate the minimum rating for *at standard* performance for introductory, intermediate and advanced level modules. The rating scale on the right defines the levels of competencies and should be applied when assessing student performance. |
|---|---|

| Observation of Student | Minimum Standard (Intro Level) | Minimum Standard (Inter Level) | Minimum Standard (Adv. Level) | TECHNIQUE REQUIREMENTS *The student:* |
|---|---|---|---|---|
| ___ | 1 | 2 | 3 | ***Work Station Routines***<br>☐ appropriately adjusts monitor, keyboard, desk, chair and other equipment to ensure workstation is ergonomically appropriate (comfortable, healthy, safe and efficient)<br>☐ maintains good body position<br>☐ observes ethical, legal and security measures in handling software and hardware (copyright, privacy, confidentiality)<br>☐ maintains an organized, neat workstation |
| ___ | 2 | 3 | 3 | ***File Management***<br>☐ labels, stores, accesses, backs up, and uses files and disks appropriately<br>☐ creates and uses appropriate filenames and directories to organize information in a logical way<br>☐ saves, retrieves, moves, copies, deletes and renames files and directories as required |
| ___ | 1 | 2 | 3 | ***Time Management/Organization***<br>☐ locates/uses multiple resources when needing assistance; e.g., print, on-line, teacher, peers<br>☐ allows adequate time for set-up and close-down procedures<br>☐ manages time effectively |
| ___ | 2 | 3 | 3 | ***Professionalism***<br>☐ takes initiative in evaluating and adjusting work processes and products to ensure they meet or exceed the standard<br>☐ responds to problems and accepts challenges by thinking critically and creatively<br>☐ uses related terminology appropriately |

**Rating Scale**

| | |
|---|---|
| **4** | Demonstrates initiative that exceeds required techniques/skills. |
| **3** | Consistently demonstrates all designated techniques/skills, rarely needs prompting. |
| **2** | Demonstrates all designated techniques/skills, occasionally needs prompting. |
| **1** | Demonstrates most designated techniques/skills, frequently needs prompting. |
| **0** | Does not demonstrate designated technique/skill. |

**REFLECTIONS/COMMENTS**


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**ASSESSMENT TASK: CAREER PROFILES** **MAMCARE**

**Standard:** Three career profiles, all sections completed for each profile

**Area of Career Exploration:** _____ **for Module** _____

| Career Profile 1 | Career Profile 2 | Career Profile 3 |
|---|---|---|
| **JOB TITLE:** | **JOB TITLE:** | **JOB TITLE:** |
| Description (tasks, working conditions) | Description (tasks, working conditions) | Description (tasks, working conditions) |
| Education qualifications | Education qualifications | Education qualifications |
| Employment opportunities | Employment opportunities | Employment opportunities |
| Advancement potential | Advancement potential | Advancement potential |
| Salary range and benefits | Salary range and benefits | Salary range and benefits |
| Would you enjoy this type of work? Why? Why not? | Would you enjoy this type of work? Why? Why not? | Would you enjoy this type of work? Why? Why not? |
| Reference used (book, interview, etc.) | Reference used (book, interview, etc.) | Reference used (book, interview, etc.) |


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| Standard: MAM2060 - Read and critique a minimum of 3 informal technical reports at level 2 competency<br>MAM3080 - Read and critique a minimum of 2 formal technical reports at level 3 competency<br>**Answer the questions below and make comments regarding each of the reports.** | **Student Name(s)**<br>**for Module** |
|---|---|

| Critique 1 | Critique 2 | Critique 3 |
|---|---|---|
| **REPORT TITLE:** | **REPORT TITLE:** | **REPORT TITLE:** |
| What is the main purpose of the report? | What is the main purpose of the report? | What is the main purpose of the report? |
| Who is the intended audience? | Who is the intended audience? | Who is the intended audience? |
| Is the content clear and concise? Explain. | Is the content clear and concise? Explain. | Is the content clear and concise? Explain. |
| What features make the content coherent, complete and correct? | What features make the content coherent, complete and correct? | What features make the content coherent, complete and correct? |
| What evidence is there of editing/ proofreading? | What evidence is there of editing/ proofreading? | What evidence is there of editing/ proofreading? |
| Suggestions for improvement. | Suggestions for improvement. | Suggestions for improvement. |


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STUDENT: _____ MODULE: MAM_____

| At Standard | *Introductory Level* | At Standard | *Intermediate Level* | At Standard | *Advanced Level* |
|---|---|---|---|---|---|
| | CORRESPONDENCE writing consists of planning, composing, revising and proofreading a:<br>☐ Personal Business Letter<br>☐ Business Letter<br>☐ Memo<br>☐ E-Mail | | TECHNICAL REPORTS (INFORMAL) - writing consists of a minimum of two informal reports in an area of interest. List and name below:<br>1.<br>2. | | TECHNICAL REPORTS (FORMAL) - writing consists of a minimum of one formal report in an area of interest. Name below:<br>1. |
| **1** | PREWRITING<br>☐ identifies main purpose<br>☐ identifies intended audience<br>☐ identifies details to be included<br>☐ completes research (if necessary)<br>☐ organizes writing using AIDA formula (attention, interest, desire, action)<br>☐ outlines details in logical order<br>☐ selects appropriate format | **2** | PREWRITING<br>☐ identifies main purpose<br>☐ identifies intended audience<br>☐ identifies details to be included<br>☐ completes research (if necessary)<br>☐ organizes writing using AIDA formula (attention, interest, desire, action)<br>☐ outlines details in logical order<br>☐ selects appropriate format | **3** | PREWRITING<br>☐ identifies main purpose<br>☐ identifies intended audience<br>☐ identifies details to be included<br>☐ completes research (if necessary)<br>☐ organizes writing using AIDA formula (attention, interest, desire, action)<br>☐ outlines details in logical order<br>☐ selects appropriate format |
| **1** | WRITING<br>☐ conveys message through use of 5 Cs<br>• clear<br>• correct<br>• coherent<br>• concise<br>• complete<br>☐ uses appropriate tone<br>☐ edits for meaning (check for spelling & typographical errors ) | **2** | WRITING<br>☐ conveys message through use of 5 Cs<br>• clear<br>• correct<br>• coherent<br>• concise<br>• complete<br>☐ uses appropriate tone<br>☐ edits for meaning (check for spelling & typographical errors ) | **3** | WRITING<br>☐ conveys message through use of 5 Cs<br>• clear<br>• correct<br>• coherent<br>• concise<br>• complete<br>☐ uses appropriate tone<br>☐ edits for meaning (check for spelling & typographical errors ) |
| **1** | REVISING/PROOFREADING<br>☐ proofreads for correct facts, dates, names & figures<br>☐ proofreads for sentence structure, grammar & punctuation<br>☐ shows evidence of edits completed by two others<br>• Name of Editor #1 _____<br>• Name of Editor #2 _____<br>☐ uses constructive feedback to revise writing | **2** | REVISING/PROOFREADING<br>☐ proofreads for correct facts, dates, names & figures<br>☐ proofreads for sentence structure, grammar & punctuation<br>☐ shows evidence of edits completed by two others<br>• Name of Editor #1 _____<br>• Name of Editor #2 _____<br>☐ uses constructive feedback to revise writing | **3** | REVISING/PROOFREADING<br>☐ proofreads for correct facts, dates, names & figures<br>☐ proofreads for sentence structure, grammar & punctuation<br>☐ shows evidence of edits completed by two others<br>• Name of Editor #1 _____<br>• Name of Editor #2 _____<br>☐ uses constructive feedback to revise writing |

| Rating Scale | **4** Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. | **3** Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. | **2** Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. | **1** Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. | **0** Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |
|---|---|---|---|---|---|


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STUDENT: _____ MODULE: MAM_____

| At Standard | *Intermediate Level - Communications Strategies II* | At Standard | *Advanced Level - Communication Strategies III* |
|---|---|---|---|
| | **ORAL PRESENTATION** – delivers an oral report using effective communications strategies<br>☐ minimum of 5 minutes<br>☐ designated topic _____ | | **ORAL PRESENTATION** – delivers an oral, formal technical report using effective communications strategies<br>☐ minimum of 10 minutes<br>☐ presentation supported by visual aids<br>☐ title of formal technical report_____ |
| 2 | **Planning of Presentation**<br>☐ chooses an appropriate topic of interest to presenter<br>☐ identifies purpose of presentation<br>☐ identifies audience<br>☐ considers time limit<br>☐ shows evidence of research | 3 | **Planning of Presentation**<br>☐ identifies audience<br>☐ considers time limit<br>☐ shows evidence of research<br>☐ prepares visual aids |
| 2 | **Organization of Presentation**<br>☐ Introduction<br>• gains listener's attention<br>• establishes credibility<br>• provides a road map for the speech<br>☐ Body<br>• determines logical order of main points<br>• provides evidence to support main points<br>☐ Conclusion<br>• summarizes main points<br>• provides recommendations or action<br>• gives audience a sense of completion<br>• leaves the listener with a single idea or point he or she is trying to make | 3 | **Organization of Presentation**<br>☐ Introduction<br>• gains listener's attention<br>• establishes credibility<br>• provides a road map for the speech<br>☐ Body<br>• determines logical order of main points<br>• provides evidence to support main points through use of visual aids<br>☐ Conclusion<br>• summarizes main points<br>• provides recommendations or action<br>• gives audience a sense of completion<br>• leaves the listener with a single idea or point he or she is trying to make |
| 2 | **Delivery**<br>☐ speaks from notes rather than prepared text<br>☐ uses positive body language (posture, hand gestures)<br>☐ demonstrates clarity in voice (tone, rate, volume of delivery)<br>☐ establishes/maintains eye contact with audience<br>☐ shows sensitivity to non-verbal cues from audience<br>☐ asks/fields questions positively<br>☐ meets set time limit | 3 | **Delivery**<br>☐ speaks from notes rather than prepared text<br>☐ uses positive body language (posture, hand gestures)<br>☐ demonstrates clarity in voice (tone, rate, volume of delivery)<br>☐ establishes/maintains eye contact with audience<br>☐ shows sensitivity to non-verbal cues from audience<br>☐ asks/fields questions positively<br>☐ meets set time limit |

| Rating Scale | **4** Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. | **3** Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. | **2** Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. | **1** Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. | **0** Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |
|---|---|---|---|---|---|


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**STUDENT NAME(S)**

| Task | Observations Of Student | | | | | |
|---|---|---|---|---|---|---|
| Planning and Presentation | 4 | 3 | 2 | 1 | 0 | N/A |
| Management Project | 4 | 3 | 2 | 1 | 0 | N/A |
| Marketing Project | 4 | 3 | 2 | 1 | 0 | N/A |
| Retailing Presentation | 4 | 3 | 2 | 1 | 0 | N/A |
| Retail Merchandising | 4 | 3 | 2 | 1 | 0 | N/A |
| Presenting/Reporting | 4 | 3 | 2 | 1 | 0 | N/A |

**STANDARD IS 1 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

*TASK CHECKLIST* – criteria for introductory level

*The student:*

☐ **Preparation and Planning**
- sets goals and follows instructions accurately
- responds to directed questions and follows necessary steps to find answers
- accesses basic in-school/community information sources
- interprets and organizes information into a logical sequence
- records information accurately using correct technical terms
- uses time effectively

**MANAGEMENT PROJECT**

**Content:**

☐ relates management concepts of planning, organizing, leading and monitoring to:
- personal and family life
- local organizations including schools
- local business, large and small

**MARKETING PROJECT**

**Content:**

☐ lists general characteristics and types of decisions made for each part of the marketing mix including:
- product
- price
- promotion
- place
- consumer
- competition

☐ designs a prototype product

or

☐ selects an existing product

☐ designs and carries out a mini market survey of product

☐ recommends marketing decisions regarding product

☐ shows the connections between assigned task and the marketing decisions made every day in the market place

**RETAILING PRESENTATION**

**Content:**

☐ explains the role of retailing in the marketplace

☐ outlines the evolution of retailing

☐ discusses the role of technology in retailing

☐ describes the major functions of retailing:
- buying
- selling
- merchandising

**RESPONSES TO RETAIL MERCHANDISING STRATEGIES**

**Content:**

☐ identifies and analyzes a variety of retail merchandising strategies related to:
- product
- price
- place
- promotion
- service

☐ **Presenting/Reporting**
- demonstrates effective use of one or more communication media
  *e.g., Written: spelling, punctuation, grammar, basic format*
  *Oral: voice projection, body language*
  *Audio-visual: techniques, tools*
- uses correct grammatical convention and technical terms through proofreading/editing
- provides an introduction that describes the purpose of the project
- communicates information in a logical sequence
- states a conclusion based on a summary of facts
- provides a reference list of three or more basic information sources (e.g., books, interviews, videos)


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STUDENT: _____

| Observations of Students | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | ☐ **Preparation and Planning**<br>• sets goals and follows instructions accurately<br>• responds to directed questions and follows necessary steps to find answers<br>• accesses basic in-school/community information sources<br>• interprets and organizes information into a logical sequence<br>• records information accurately using correct technical terms<br>• uses time effectively |
| 4<br>3<br>2<br>1<br>0 | **Content of Customer Portfolio**<br>☐ describes target markets including participants, demographics and psychographics for a:<br>– product<br>– retailer<br>– service<br>☐ analyzes a minimum of five advertisements from newspapers and/or magazines and indicate five different buying motives used<br>☐ identifies three recent purchases made and indicates whether they were:<br>– wants or needs and why<br>– factors that influenced each of the purchases<br>☐ describes the AIDA concept and how it is used to influence purchases |
| 4<br>3<br>2<br>1<br>0 | ☐ **Presenting/Reporting**<br>• demonstrates effective use of one or more communication media:<br>*e.g., Written: spelling, punctuation, grammar*<br>*basic format*<br>*Oral: voice projection, body language*<br>*Audio-visual: techniques, tools*<br>• uses correct grammatical convention and technical terms through proofreading/editing<br>• provides an introduction that describes the purpose of the project<br>• communicates information in a logical sequence<br>• states a conclusion based on a summary of facts<br>• provides a reference list of three or more basic information sources (e.g., books, interviews, videos). |

**STANDARD IS 1 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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STUDENT: _____ TRAINING SITE: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **Shows Up for Work**<br>☐ shows up for scheduled work shifts<br>☐ arrives early in order to organize self and store |
| 4<br>3<br>2<br>1<br>0 | **Provides Quality Customer Service**<br>☐ shows knowledge of products in store<br>☐ completes opening and closing procedures<br>☐ greets customers in an appropriate manner<br>☐ acts friendly and helpful during the sale<br>☐ handles customer complaints<br>☐ takes leave of customers in an appropriate manner |
| 4<br>3<br>2<br>1<br>0 | **Performs Non-Selling Duties**<br>☐ follows store policy and procedures<br>☐ maintains well-stocked shelves<br>☐ contributes to the general upkeep and maintenance of the store<br>☐ assists in visual merchandising (stock on shelves, in-store displays, window displays)<br>☐ assists in the preparation of promotional campaigns (creating advertisements, posters, etc.) |
| 4<br>3<br>2<br>1<br>0 | **Works Collaboratively**<br>☐ gets along with other co-workers<br>☐ helps fellow co-workers when necessary to help balance workload<br>☐ contributes to problem solving and decision making |
| 4<br>3<br>2<br>1<br>0 | **Presents Personal Characteristics**<br>☐ dresses appropriately work for work situation<br>☐ demonstrates reliability and dependability<br>☐ acts eager, enthusiastic and confident<br>☐ makes a commitment to quality customer service |

**STANDARD IS 3 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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STUDENT: _____ TRAINING SITE: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| | **Sets Up the Cash Register** |
| 4<br>3<br>2<br>1<br>0 | ☐ counts and confirms the accuracy of the float<br>☐ ensures cash drawer is properly organized<br>☐ verifies total sales and customer count has been cleared to zero<br>☐ identifies appropriate clerk key to use and code name into terminal if possible<br>☐ checks to ensure there is sufficient journal and receipt tape |
| | **Serves Customers** |
| 4<br>3<br>2<br>1<br>0 | ☐ greets customers in an appropriate manner<br>☐ acts friendly and helpful during the sale<br>☐ bags the merchandise properly<br>☐ takes leave of the customer in an appropriate manner |
| | **Rings in Sales** |
| 4<br>3<br>2<br>1<br>0 | ☐ enters sales accurately (minimum five items in each sale)<br>☐ handles money tendered properly<br>☐ makes change using least amount of coins and bill possible<br>☐ counts change back to customers from the amount of the sale to amount tendered |
| | **Completes Cash Register/Terminal Closing Procedures** |
| 4<br>3<br>2<br>1<br>0 | ☐ clears terminal of daily sales and customers<br>☐ generates a detailed audit tape of daily sales<br>☐ removes journal tape and rethreads tape in machine<br>☐ sets up cash float and removes daily sales |
| 4<br>3<br>2<br>1<br>0 | **Completes Cash Reconciliation**<br>☐ counts money and completes cash out reports<br>☐ completes a deposit slip for daily sales<br>☐ organizes cash for deposit (coins and bills) |

**STANDARD IS 3 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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STUDENT: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| | **Communicates on the Telephone** |
| 4 | ☐ answers phone promptly (before third ring) |
| | ☐ identifies business and/or self |
| 3 | ☐ makes callers comfortable through use of |
| | – voice (friendly, unhurried) |
| 2 | – language (professional, does not use slang) |
| | – tone (interested attitude) |
| 1 | ☐ listens attentively |
| | ☐ transfers call if necessary |
| 0 | ☐ handles a variety of situations appropriately; e.g., caller on hold, complaints, persistent |
| | ☐ takes accurate messages |
| | **Communicates Face to Face** |
| 4 | ☐ demonstrates a genuinely helpful attitude |
| | ☐ offers a pleasant friendly smile and makes eye contact |
| 3 | ☐ gives a cheerful greeting to visitors/customers/clients |
| | ☐ remembers names and recognizes visitors/customers/clients |
| 2 | ☐ uses proper protocol for given situation; e.g., use of last names, first names, titles |
| 1 | ☐ dresses appropriately for given situation |
| | ☐ shows courtesy, understanding and respect |
| 0 | ☐ demonstrates competence for given situation |
| | ☐ handles a variety of situations appropriately; e.g., introductions, greeting visitors/customers/clients, difficult/awkward situations |

**STANDARD IS 1 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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**STUDENT NAME(S)**

| Task | Observations Of Student |
|---|---|
| Planning and Presentation | 4 3 2 1 0 N/A |
| Quality Management | 4 3 2 1 0 N/A |
| Role of Managers | 4 3 2 1 0 N/A |
| Management Analysis | 4 3 2 1 0 N/A |
| Critical Review | 4 3 2 1 0 N/A |
| Presenting/Reporting | 4 3 2 1 0 N/A |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems critically and creatively in a self-direct manner. Selects and uses tools, materials and/or processes efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-direct manner. Selects and uses tools, materials and/or processes efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Selects and uses tools, materials and/or processes appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. Uses tools, materials and/or processes appropriately. |
| **0** | Has not yet completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

***TASK CHECKLIST*** - criteria for intermediate level

*The student:*

☐ **Preparation and Planning**
- sets goals and describes steps to achieve them
- uses personal initiative to formulate questions and find answers
- accesses a range of relevant in-school/community resources
- interprets, organizes and combines information into a logical sequence
- records information accurately with appropriate supporting detail and using correct technical terms
- plans and uses time effectively
- gathers and responds to feedback regarding approach to task and project status

**QUALITY MANAGEMENT PRESENTATION**

**Content:**

☐ describes the role of customers, employees and managers in developing systems and strategies for improved quality
☐ explores the role of teams and collaboration in the development of improved quality
☐ explains who makes the decisions regarding changes in an organization focusing on improved quality

**THE ROLE OF MANAGERS**

**Content:**

☐ identifies four case studies from a variety of sources (e.g., television, videos, magazines, journal articles, newspaper clippings or books)
☐ analyzes each of the cases by including:
- a short overview of the organization and its management structure
- a description of how managers encourage (or do not encourage) improvement in the organization through strategies used during the planning, organizing, leading, implementation and monitoring stages
- your personal impressions on the strategies used
- suggestions of strategies you would use if managing the organization

**MANAGEMENT ANALYSIS REPORT**

**Content:**

☐ identifies an area that needs improvement
☐ defines the problem
☐ describes the goals and gives a rationale for changing the system (outline the current system and strategies being used and how you intend to improve it)
☐ outlines a plan for implementation
☐ implements the plan
☐ monitors the change
☐ evaluates the plan and reports on the oversuccess or drawbacks of the action taken
☐ makes adjustments as required

**CRITICAL REVIEW**

**Content:**

☐ summarizes a current management system in regards to:
- overview
- strategies & use
- pros & cons
- personal views

☐ **Presenting/Reporting**
- demonstrates effective use of at least two communication media:
  *e.g., Written: spelling, punctuation, grammar, format (formal/informal)*
  *Oral: voice projection, body language, appearance*
  *Visual: techniques, tools, clarity*
- maintains acceptable grammatical and technical standards through proofreading and editing
- provides an introduction that describes the purpose and scope of the project
- communicates ideas into a logical sequence with sufficient supporting detail
- states a conclusion by synthesizing the information gathered
- provides a reference list that includes five or more relevant information sources


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**Student Name(s)**_____ **Standard:** **collects and evaluates a minimum of three print advertisements, complete all sections below.**

| Print Ad 1 | Print Ad 2 | Print Ad 3 |
|---|---|---|
| Name magazine, newspaper, etc. | Name magazine, newspaper, etc. | Name magazine, newspaper, etc. |
| Identify target market. | Identify target market. | Identify target market. |
| State the objective of the advertisement. | State the objective of the advertisement. | State the objective of the advertisement. |
| Comment on use of AIDA concept. | Comment on use of AIDA concept. | Comment on use of AIDA concept. |
| Identify elements presented in the advertisement.<br>☐ headline<br>☐ dominate feature<br>☐ copy<br>☐ related items (suggested selling)<br>☐ price<br>☐ logo (signature cut)<br>☐ other information (e.g., address, phone, hours)<br>☐ border<br>☐ limited number of fonts<br>☐ effective use of white space | Identify elements presented in the advertisement.<br>☐ headline<br>☐ dominate feature<br>☐ copy<br>☐ related items (suggested selling)<br>☐ price<br>☐ logo (signature cut)<br>☐ other information (e.g., address, phone, hours)<br>☐ border<br>☐ limited number of fonts<br>☐ effective use of white space | Identify elements presented in the advertisement.<br>☐ headline<br>☐ dominate feature<br>☐ copy<br>☐ related items (suggested selling)<br>☐ price<br>☐ logo (signature cut)<br>☐ other information (e.g., address, phone, hours)<br>☐ border<br>☐ limited number of fonts<br>☐ effective use of white space |
| Comment on the overall presentation of ad. | Comment on the overall presentation of ad. | Comments on the overall presentation of ad. |


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*[The 1997 text was deleted September 1999.]*


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STUDENT: _____ NAME OF PRODUCT: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **Creativity and neatness**<br>☐ all parts of the ad are attractive<br>☐ the ad has a clean, uncluttered look<br>☐ idea is original, unique and clever |
| 4<br>3<br>2<br>1<br>0 | **Layout**<br>☐ typefaces (fonts) selected are appropriate for the product or store<br>☐ white space used properly to enhance the overall appearance of the advertisement<br>☐ the ad has a focal point (a place for the eye to begin)<br>☐ the ad flows (positioning each element in a logical place, moving the reader's eye from one element to the other)<br>☐ all parts of the advertisement tie together and relate to the objective of the advertisement |
| 4<br>3<br>2<br>1<br>0 | **Parts of an advertisement**<br>☐ attention-getting *headline*<br>☐ dominant *illustration* that enables reader to tell at a glance what the ad is about<br>☐ *copy* relates product features and turns them into customer benefits<br>☐ recognizable *logo* is present |
| 4<br>3<br>2<br>1<br>0 | **Selling Power**<br>☐ overall impact of ad induces the reader into action<br>☐ other information pertinent to the reader is given; e.g., store hours, address, phone number<br>☐ action words are used to bring the customer into the store; e.g., limited offer/quantities |
| 4<br>3<br>2<br>1<br>0 | **Oral Presentation**<br>☐ explains how the objective was achieved and the section of the newspaper the ad would best be placed<br>☐ describes how the AIDA concept was used in developing the advertisement |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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*[The 1997 text was deleted September 1999.]*


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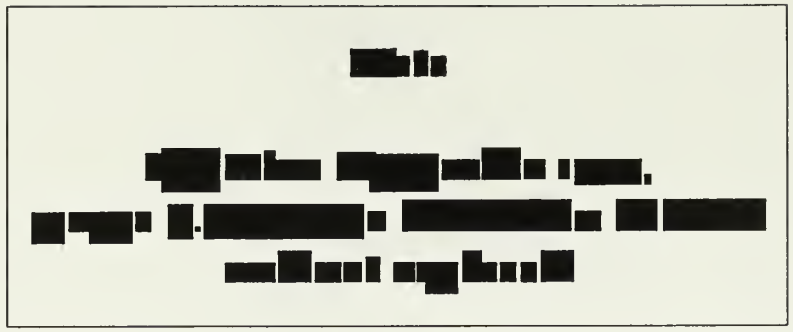


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**ASSESSMENT TASK CHECKLIST: VISUAL MERCHANDISING MANUAL** **MAM2030–1**

**Student Name(s)**_____

## Types of Displays

☐ presents and describes the following types of exterior displays:
- ☐open
- ☐closed
- ☐partially closed

☐ presents and describes the following types of interior displays:
- ☐display racks
- ☐gondola display
- ☐table display
- ☐dump display
- ☐package display
- ☐platform display
- ☐architectural display
- ☐showcase display

## Elements of Design in VM

☐ demonstrates the atmosphere the following lines create in visual merchandising:
- ☐vertical
- ☐horizontal
- ☐curved
- ☐diagonal

☐ presents examples of the following shapes and how they are used in visual merchandising:
- ☐geometric
- ☐organic
- ☐positive
- ☐negative

☐ demonstrates knowledge and use of:
- ☐colour wheel
- ☐different moods colours create
- ☐monochromatic colour schemes
- ☐analogous colour schemes
- ☐triadic colour schemes
- ☐complimentary colour schemes

☐ demonstrates the atmosphere created through the use of five different textures:
- ☐_____
- ☐_____
- ☐_____
- ☐_____
- ☐_____

☐ demonstrate knowledge and use of weight and size in visual merchandising:
- ☐big vs. small
- ☐light vs. dark
- ☐oversized
- ☐foreground vs. background

## Principles of Design in VM

☐ demonstrates and explains when to use each the following visual merchandising arrangements:
- ☐interface
- ☐stair-step
- ☐pyramid
- ☐zigzag
- ☐repetition
- ☐radiation

☐ demonstrates and explains the use of the following design principles in visual merchandising:
- ☐harmony
- ☐contrast
- ☐rhythm
- ☐proportion
- ☐emphasis
- ☐unity

☐ demonstrates and explains the following types of balance:
- ☐formal
- ☐informal

☐ demonstrates and explains the following types of lighting:
- ☐direct
- ☐indirect

**STANDARD IS 2 IN EACH APPLICABLE TASK AREA**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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## ASSESSMENT TASK: YEARLY VISUAL MERCHANDISING PLANNER — MAM2030–2

**Standard:** Prepare a visual merchandising plan for a calendar year for a particular business (**minimum of eight display ideas for the year**). Ideas should include type of display, theme, merchandise, props, supplies needed and a sketch showing the merchandise and elements and principles of design being applied. This task will be used for future display ideas.

| Description of Display | |
|---|---|
| ☐ | Month/season and event being promoted |
| ☐ | Type of display, display theme or idea |
| ☐ | Merchandise to use |
| ☐ | Props and supplies necessary to complete display |

| | |
|---|---|
| ☐ | Colour/Colour Scheme |
| ☐ | Display arrangement and principles used. |

**STANDARD IS 2 IN EACH APPLICABLE TASK AREA**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

☐ Make a sketch of your display below


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**ASSESSMENT GUIDE: VISUAL MERCHANDISING PRESENTATIONS** **MAM2030–3**

STUDENT: _____ THEME OF VISUAL MERCHANDISING PRESENTATION: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **Power to Attract Attention**<br>☐ dominant feature attracts attention<br>☐ appropriate background used<br>☐ colour, lighting and props enhance theme and merchandise<br>☐ idea is original, unique and clever |
| 4<br>3<br>2<br>1<br>0 | **Arrangement**<br>☐ proper amounts of merchandise used<br>☐ all elements are in proportion<br>☐ use of line and design principles leads eye to focal point<br>☐ specific arrangement of goods is evident<br>☐ display is in balance (formal or informal) |
| 4<br>3<br>2<br>1<br>0 | **Selling Power**<br>☐ display creates interest and desire for the merchandise<br>☐ customer can find and concentrate on most important item(s) being sold<br>☐ related merchandise is presented<br>☐ all parts of the display create unity |
| 4<br>3<br>2<br>1<br>0 | **Technical Excellence and Cleanliness**<br>☐ supplies are used effectively to display merchandise<br>☐ all props (forms and fixtures) are clean and in good repair<br>☐ background, ceiling, floor and glass is clean and neat<br>☐ show card is professional looking |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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## ASSESSMENT TASK: EVALUATION OF VISUAL MERCHANDISING PRESENTATIONS — MAM2030–4

Student Name(s) _____ Standard: minimum of three observations, all sections completed

### General Appearance

- ☐ Name of store and location.
- ☐ What event is being presented? What is the theme?
- ☐ What merchandise is being presented? (items for sale)
- ☐ What props have been used? Remember these enhance the theme and merchandise.
- ☐ What supplies were necessary to complete this presentation? (little things—fish wire, staple gun, etc.)

### Elements and Principles of Design

- ☐ Does the presentation use formal or informal balance? Justify your observation.
- ☐ Describe how the display does or does not create unity.
- ☐ What colours and colour schemes have been used?
- ☐ Has a specific display arrangement or combination of arrangements been used. Explain.

- ☐ Does the display have lights? If yes, describe them.
- ☐ What are some of the other elements and principles of design used in the creation of this display?

### Overall Impression

☐ ☐ ☐ ☐ ☐ ☐

Poor **0 1 2 3 4** Excellent

**Student Reflections regarding overall impression**



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Student(s) _____

| Task | Observations of Student |
|---|---|
| Preparation and Planning | 4 3 2 1 0 N/A |
| Information Gathering and Processing | 4 3 2 1 0 N/A |
| Content | 4 3 2 1 0 N/A |
| Collaboration and Teamwork | 4 3 2 1 0 N/A |
| Information Sharing | 4 3 2 1 0 N/A |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
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| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

*TASK CHECKLIST*

*The student:*

☐ **Preparation and Planning**
- sets goals and establishes steps to achieve them
- creates and adheres to useful timelines
- uses personal initiative to formulate questions and find answers
- plans and uses time effectively

☐ **Information Gathering and Processing**
- accesses a range of relevant in-school/community resources
- uses a range of information-gathering techniques
- interprets, organizes and combines information into a logical sequence
- records information accurately with appropriate supporting detail and using correct technical terms
- determines accuracy/currency/reliability of information sources
- gathers and responds to feedback regarding approach to the task

**Content**

☐ researches and reports on a particular store's policies and procedures including:
- sales and service policies
- credit and collection
- store security
- human resources
- recordkeeping

☐ **Collaboration and Teamwork**
- cooperates with group members
- shares work appropriately among group members
- negotiates solutions to problems

☐ **Information Sharing**
- demonstrates effective use of two or more communication media:
  *e.g., written, oral, audio-visual*
- communicates ideas in a logical sequence with sufficient supporting detail
- maintains acceptable grammatical and technical standards
- cites five or more relevant information sources

**REFLECTIONS/COMMENTS**


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## ASSESSMENT TASK: BUYING, RECEIVING AND PAYMENT OF GOODS AND SERVICES — MAM2040–2

STUDENT: _____ TRAINING SITE: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **Preparation and Planning**<br>☐ prepares self for task<br>☐ organizes and works in orderly manner<br>☐ interprets and carries out instructions accurately<br>☐ demonstrates proper office etiquette<br>☐ plans and uses time effectively<br>☐ adheres to routine procedu<br>☐ res |
| 4<br>3<br>2<br>1<br>0 | **Buys Goods and Services**<br>☐ identifies and classifies (convenience, shopping, staple, etc.) potential products and services to purchase<br>☐ determines their stages in the produce/fashion cycle<br>☐ evaluates a minimum of two suppliers (vendors) for quality, quantity, price and delivery for a variety of merchandise<br>☐ quotes prices from two or more suppliers (vendors) for a variety of merchandise<br>☐ selects merchandise to order<br>☐ prepares purchase orders<br>☐ maintains adequate stock<br>☐ explain shipping terms available to purchaser; e.g., FOB factory, destination |
| 4<br>3<br>2<br>1<br>0 | **Receives Goods and Services**<br>☐ describes receiving dock procedures<br>☐ recommends the type of check to use for a variety of merchandise; e.g., direct, blind, spot, quality<br>☐ recommends policy and procedures for damaged goods or short shipments |
| 4<br>3<br>2<br>1<br>0 | **Pays for Goods and Services**<br>☐ verifies accuracy of invoices<br>☐ calculates due dates of invoices<br>☐ calculates trade or cash discounts and net amount of invoices<br>☐ records payment of invoice in journal<br>☐ pays invoice by chcque |
| 4<br>3<br>2<br>1<br>0 | **Works Collaboratively**<br>☐ cooperate with group members<br>☐ share work appropriately with group members<br>☐ negotiate solutions to problems |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
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| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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**ASSESSMENT TASK: PRICING AND CONTROLLING GOODS AND SERVICES** **MAM2040–3**

STUDENT: _____ TRAINING SITE: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **Preparation and Planning**<br>☐ prepares self for task<br>☐ organizes and works in orderly manner<br>☐ interprets and carries out instructions accurately<br>☐ plans and uses time effectively<br>☐ adheres to routine procedures |
| 4<br>3<br>2<br>1<br>0 | **Prices, Goods and Services**<br>☐ determines the best marking procedures to use for a variety of merchandise<br>☐ calculates markups based on cost and retail<br>☐ determines why and when to markdown goods<br>☐ calculates markdowns<br>☐ calculates break-even points<br>☐ creates appropriate price tags for merchandise<br>☐ evaluates the effects of policies |
| 4<br>3<br>2<br>1<br>0 | **Controls Goods and Services**<br>☐ evaluates and recommends methods of inventory control for a variety of merchandise (fifo, lifo, perpetual, importance of stock rotation)<br>☐ takes a stock count of goods<br>☐ prepares and calculates an inventory list<br>☐ calculates stock turnover and explain its purpose<br>☐ relates alternative methods of stocking goods (on and off selling floor)<br>☐ recommends procedures to improve an inventory system |
| 4<br>3<br>2<br>1<br>0 | **Works Collaboratively**<br>☐ cooperates with group members<br>☐ shares work appropriately with group members<br>☐ negotiates solutions to problems |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
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| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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Student(s) _____

| Task | Observations of Student |
|---|---|
| Preparation and Planning | 4 3 2 1 0 N/A |
| Information Gathering and Processing | 4 3 2 1 0 N/A |
| Content | 4 3 2 1 0 N/A |
| Collaboration and Teamwork | 4 3 2 1 0 N/A |
| Information Sharing | 4 3 2 1 0 N/A |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
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***TASK CHECKLIST***

*The student:*

☐ **Preparation and Planning**
- sets goals and establishes steps to achieve them
- creates and adheres to useful timelines
- uses personal initiative to formulate questions and find answers
- plans and uses time effectively

☐ **Information Gathering and Processing**
- accesses a range of relevant in-school/community resources
- uses a range of information-gathering techniques
- interprets, organizes and combines information into a logical sequence
- records information accurately with appropriate supporting detail and using correct technical terms
- determines accuracy/currency/reliability of information sources
- gathers and responds to feedback regarding approach to the task

**Content** – describes and analyzes a selected office including:
☐ name of environment and type of business
☐ flowchart of organization
☐ explanation (rationale) for how office is physically organized

**Content** (continued)
☐ explains how tasks are defined for employees (e.g., job descriptions, individual vs. work teams).
☐ explains how management supports or does not support a commitment to continuous improvement through:
- customer satisfaction
- leadership
- employee relations/training
- teamwork

(give details to support findings)

☐ identifies and assesses the equipment used in the office. (questions to consider: what equipment is available, who has access to the equipment, what are the safety and security concerns)

☐ **Collaboration and Teamwork**
- cooperates with group members
- shares work appropriately among group members
- negotiates solutions to problems

☐ **Information Sharing**
- demonstrates effective use of two or more communication media: *e.g., written, oral, audio-visual*
- communicates ideas in a logical sequence with sufficient supporting detail
- maintains acceptable grammatical and technical standards
- cites five or more relevant information sources

**REFLECTIONS/COMMENTS**


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**ASSESSMENT TASK: OFFICE SYSTEMS 1 - PRACTICAL LAB EXPERIENCE** **MAM2050–2**

STUDENT: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **Preparation and Planning**<br>☐ prepares self for task<br>☐ organizes and works in orderly manner<br>☐ interprets and carries out instructions accurately<br>☐ demonstrates proper office etiquette<br>☐ plans and uses time effectively<br>☐ adheres to routine procedures |
| 4<br>3<br>2<br>1<br>0 | **Uses Equipment and Materials** - list type and model of each piece of equipment below.<br>☐ chooses and uses appropriate electronic equipment<br>☐ demonstrates ability to operate _____ efficiently<br>☐ demonstrates ability to operate _____ efficiently<br>☐ demonstrates ability to operate _____ efficiently<br>☐ models safe procedures and techniques<br>☐ follows procedures for upkeep, repairs and reordering of supplies<br>☐ minimizes waste of supplies |
| 4<br>3<br>2<br>1<br>0 | **Works Collaboratively**<br>☐ cooperates with group members<br>☐ shares work appropriately with group members<br>☐ negotiates solutions to problems |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
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| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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STUDENT: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **Preparation and Planning**<br>☐ sets goals and describes steps to achieve them<br>☐ uses personal initiative to formulate questions and find answers<br>☐ accesses a range of relevant in-school/community resources<br>☐ interprets, organizes and combines information into a logical sequence<br>☐ records information accurately with appropriate supporting detail and using correct technical terms<br>☐ plans and uses time effectively<br>☐ gathers and responds to feedback regarding approach to task and project status |
| 4<br>3<br>2<br>1<br>0 | **Content of Office Manual and/or Demonstration of Work Experience** – for written communications transmittals<br>☐ processes incoming mail – policies and procedures used for the opening, organizing and distributing of mail<br>☐ processes outgoing mail – policies and procedures used for addressing, collecting, posting and delivering of mail including use of priority mail services<br>☐ uses a variety of postal services – policies and procedures used when making decisions regarding the appropriate postal services or private couriers to use |
| 4<br>3<br>2<br>1<br>0 | **Presenting/Reporting (if applicable)**<br>☐ demonstrates effective use of at least two communication media:<br>*e.g., Written: spelling, punctuation, grammar, format (formal/informal)*<br>*Oral: voice projection, body language, appearance*<br>*Audio-visual: techniques, tools, clarity*<br>☐ maintains acceptable grammatical and technical standards through proofreading and editing<br>☐ provides an introduction that describes the purpose and scope of the project<br>☐ communicates ideas into a logical sequence with sufficient supporting detail<br>☐ states a conclusion by synthesizing the information gathered |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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STUDENT: _____

| Observations of Students | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **Preparation and Planning**<br>☐ sets goals and describes steps to achieve them<br>☐ uses personal initiative to formulate questions and find answers<br>☐ accesses a range of relevant in-school/community resources<br>☐ interprets, organizes and combines information into a logical sequence<br>☐ records information accurately with appropriate supporting detail and using correct technical terms<br>☐ plans and uses time effectively<br>☐ gathers and responds to feedback regarding approach to task and project status. |
| 4<br>3<br>2<br>1<br>0 | **Content of Travel Project—making arrangements for a business trip**<br>☐ creates a scenario for a planned business trip<br>☐ contacts a minimum of two travel agencies to gather necessary information<br>☐ makes decisions regarding who to book through and the rationale for the selection made. Consideration should be give to:<br>• mode(s) of transportation<br>• accommodation<br>• passport/medical/insurance<br>• currency<br>☐ pays special attention to international travel<br>☐ prepares itinerary in logical sequence of events, accurate and complete and arrangements for complimentary services if required<br>☐ prepares budget and expense claims – accurate and supporting documents attached |
| 4<br>3<br>2<br>1<br>0 | **Presenting/Reporting**<br>☐ demonstrates effective use of at least two communication media:<br>*e.g., Written: spelling, punctuation, grammar, format (formal/informal)*<br>*Oral: voice projection, body language, appearance*<br>*Audio-visual: techniques, tools, clarity*<br>☐ maintains acceptable grammatical and technical standards through proofreading and editing<br>☐ provides an introduction that describes the purpose and scope of the project<br>☐ communicates ideas into a logical sequence with sufficient supporting detail<br>☐ states a conclusion by synthesizing the information gathered<br>☐ provides a reference list that includes five or more relevant information sources |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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**ASSESSMENT GUIDE: RECORDS MANAGEMENT PROJECT** **MAM2080–1**

STUDENT: _____ TRAINING SITE: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **Preparation and Planning**<br>☐ prepares self for task<br>☐ organizes and works in an orderly manner<br>☐ interprets and carries out instructions accurately<br>☐ demonstrates proper office etiquette<br>☐ plans and uses time effectively<br>☐ adheres to routine records management procedures |
| 4<br>3<br>2<br>1<br>0 | **Uses an Alphabetic Records Management System**<br>☐ uses a set of prescribed records to demonstrate hands-on experience in the use of an alphabetic records management system including:<br>• indexing of a minimum of 50 records using all of the basic alphabetic filing rules<br>• using cross-references when necessary<br>• filing records within an existing alphabetic records management system |
| 4<br>3<br>2<br>1<br>0 | **Retrieves Alphabetic Records from the System**<br>☐ pulls specific records as required<br>☐ uses correct charge-out procedures; e.g., outguides or outfolders<br>☐ refiles records<br>☐ analyses strategies used during filing project<br>☐ makes recommendations for improved strategies |

**STANDARD IS 1 EACH APPLICABLE TASK with 65% accuracy**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
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| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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## STUDENT NAME(S)

| Task | Observations Of Student | | | | | |
|---|---|---|---|---|---|---|
| Planning and Presentation | 4 | 3 | 2 | 1 | 0 | N/A |
| Organizational Charts | 4 | 3 | 2 | 1 | 0 | N/A |
| Management Theories | 4 | 3 | 2 | 1 | 0 | N/A |
| Roles & Responsibilities | 4 | 3 | 2 | 1 | 0 | N/A |
| Success/Failure | 4 | 3 | 2 | 1 | 0 | N/A |
| Management Issue | 4 | 3 | 2 | 1 | 0 | N/A |
| Presenting/Reporting | 4 | 3 | 2 | 1 | 0 | N/A |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

### Rating Scale

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
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| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

*TASK CHECKLIST* - criteria for advanced level

*The student:*

☐ **Preparation and Planning**
- sets goals and describe steps to achieve them
- uses personal initiative to formulate questions and find answers
- accesses a range of relevant information sources and recognize when additional information is required
- interprets, organizes and combines information in creative and thoughtful ways
- records information accurately using appropriate technical terms and supporting detail
- plans and uses time effectively, prioritizing tasks on a consistent basis
- assesses and refines approach to task and project status based on feedback and reflection

**ORGANIZATIONAL CHARTS**

**Content**

☐ charts an existing business/organization for each of the following organizational structures:
- functional
- line and staff
- geographical
- matrix

☐ includes on each chart
- levels of management (top-level, mid-level, supervisory)
- channels of communications and flow of information

**MANAGEMENT THEORIES**

**Content**

☐ chooses three different management theories to critique
☐ gives an overview of theory
☐ identifies the strengths and weakness of each theory
☐ identifies which organizational structure would best suit each theory
☐ selects the theory he or she would be most comfortable working within and explains why
☐ gives personal opinions regarding future trends

**ROLES AND RESPONSIBLILITES**

**Content**

☐ explains the functions/responsibilities of each of the following
- research and development
- production/manufacturing
- finance/accounting
- marketing
- purchasing
- administration
- human resources

**SUCCESS/FAILURE OF BUSINESSES -**

**Content**

☐ selects or is given three case studies
☐ summarizes the nature of each business
☐ describes the characteristics that make the business a success/failure
☐ identifies how success/failure is measured for each

**PRESENTATION OF MANAGEMENT ISSUE**

**Content**

☐ identifies the management issue from a business point of view
☐ debates the pros and cons surrounding the issue
☐ recommends a variety of solutions to the management issue
☐ recommends and defends a course of action

☐ **Presenting/Reporting**
- demonstrates effective use of a variety of communication media:

  *e.g., Written: spelling, punctuation, grammar, format (formal/informal, technical/literary)*

  *Oral: voice projection, body language, appearance, enthusiasm, evidence of prior practice*

  *Visual: techniques, tools, clarity, speed and pacing*
- maintains acceptable grammatical and technical standards through proofreading and editing
- provides an introduction that describes the purpose and scope of the project
- communicates thoughts/feelings/ideas clearly to justify or challenge a position
- states a conclusion by analyzing and synthesizing the information gathered
- gives evidence of adequate research through a reference list including seven or more relevant information sources
- provides a reference list that includes five or more relevant information sources


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**Student(s)** _____

| Task | Observations Of Student | | | | | |
|---|---|---|---|---|---|---|
| Planning and Presentation | 4 | 3 | 2 | 1 | 0 | N/A |
| Information Gathering and Processing | 4 | 3 | 2 | 1 | 0 | N/A |
| Canadian Economy | 4 | 3 | 2 | 1 | 0 | N/A |
| Economic Issue | 4 | 3 | 2 | 1 | 0 | N/A |
| Collaboration and Teamwork | 4 | 3 | 2 | 1 | 0 | N/A |
| Information Sharing | 4 | 3 | 2 | 1 | 0 | N/A |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
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| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

*TASK CHECKLIST*

*The student:*

☐ **Preparation and Planning**
- sets goals and establish steps to achieve them
- creates and adheres to useful timelines
- uses personal initiative to formulate questions and find answers
- plans and uses time effectively

☐ **Information Gathering and Processing**
- accesses a range of relevant in-school/community resources
- uses a range of information-gathering techniques
- interprets, organizes and combines information into a logical sequence
- records information accurately with appropriate supporting detail and using correct technical terms
- determines accuracy/currency/reliability of information sources
- gathers and responds to feedback regarding approach to the task

**CANADIAN ECONOMY – a report/presentation**

**Content**

☐ describes Canada's mixed economy
☐ explains the goals of Canada's economic system
☐ provides examples of goods and services provided in the public and private sectors
☐ describes the circular flow and the role of profit
☐ charts a timeline of Canada's business cycle over the past 50 years and actions taken to stabilize the economy
☐ explains how income is earned and spent
☐ describes the role of the Bank of Canada and other financial institutions
☐ constructs and explains supply and demand graphs

**EVALUATING AN ECONOMIC ISSUE—a position paper**

**Content**

☐ identifies an issue
☐ summarizes the concerns of all sides
☐ states a personal position
☐ recommends course of action

☐ **Collaboration and Teamwork**
- cooperates with group members
- shares work appropriately among group members
- negotiates solutions to problems

☐ **Information Sharing**
- demonstrates effective use of two or more communication media
  *e.g., written, oral, audio-visual*
- communicates ideas in a logical sequence with sufficient supporting detail
- maintains acceptable grammatical and technical standards
- cites five or more relevant information sources

**REFLECTIONS/COMMENTS**


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STUDENT NAME(S) _____

_____

| Task | Observations Of Student | | | | | |
|---|---|---|---|---|---|---|
| Planning and Presentation | 4 | 3 | 2 | 1 | 0 | N/A |
| Comparing International Businesses | 4 | 3 | 2 | 1 | 0 | N/A |
| Analyzing Case Studies | 4 | 3 | 2 | 1 | 0 | N/A |
| Presenting/ Reporting | 4 | 3 | 2 | 1 | 0 | N/A |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
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***TASK CHECKLIST***

*The student:*

☐ **Preparation and Planning**
- sets goals and describe steps to achieve them
- uses personal initiative to formulate questions and find answers
- accesses a range of relevant information sources and recognize when additional information is required
- interprets, organizes and combines information in creative and thoughtful ways
- records information accurately using appropriate technical terms and supporting detail
- plans and uses time effectively, prioritizing tasks on a consistent basis
- assesses and refines approach to task and project status based on feedback and reflection

**COMPARING INTERNATIONAL BUSINESSES – research a minimum of four businesses (two with developing nations and two with developed nations and report on the following:**

**Content**

☐ name of company an products or services they import or export
☐ organizational structure; e.g., multinational, small entrepreneurial
☐ management and marketing systems and strategies used
☐ constraints and considerations identified when doing business with the foreign nation; e.g., language, transportation
☐ local challenges resulting from global competition

**ANALYZING CASE STUDIES**

**Content**

☐ selects or is given four case studies
☐ summarizes the nature of each business
☐ presents management strategies used
☐ presents marketing strategies used
☐ presents opinions regarding the business venture

☐ **Presenting/Reporting**
- demonstrates effective use of a variety of communication media:
  *e.g.,* Written: *spelling, punctuation, grammar, format (formal/informal, technical/ literary)*
  Oral: *voice projection, body language, appearance, enthusiasm, evidence of prior practice*
  Visual: *techniques, tools, clarity, speed and pacing*
- maintains acceptable grammatical and technical standards through proofreading and editing
- provides an introduction that describes the purpose and scope of the project
- communicates thoughts/feelings/ideas clearly to justify or challenge a position
- states a conclusion by analyzing and synthesizing the information gathered
- gives evidence of adequate research through a reference list including seven or more relevant information sources
- provides a reference list that includes five or more relevant information sources

**REFLECTIONS/COMMENTS**


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## GLOBAL MARKETPLACE RESEARCH PROJECT

In this research project you will be asked to work with a partner. Select two countries to research. One must be a developed country, the other a developing country. Each of the partners will take a country and complete the research within Section I. Work collaboratively on Sections II and III.

This report should be typed APA style or formatted formally in another style, with references being cited where appropriate. Make sure you have a table of contents at the beginning and a reference list at the end.

This report will be divided into three sections. The first is to investigate how Canadians do business with foreign countries by researching a developed country and a developing country and their people. The next section of the research will ask you to work together to compare the developing and developed countries. The last section will ask you to give recommendations and conclusions for both countries including the following information:

- opportunities for importing goods and/or services into Canada from these countries
- opportunities to export Canadian goods or services to each country
- would you do business with these countries based on bigger global issues such as the environment and human rights concerns?

### Library Resources

Box, Ben (Ed.). (1993) *South American Handbook*. Bath, England: Trade and Travel Publications.

Kurian, George Thomas (Ed.). (1992) *Encyclopaedia of the Third World*, Fourth Edition. Volumes I–III. New York: Facts on File.

Kurian, George Thomas (Ed.). (1990) *Encyclopaedia of the First World*, Volumes I & II. New York: Facts on File.

*Lands and People*. (1991). Volumes 1–6. Danbury, Conn: Grolier.

World Resources Institutes (Eds.). (1993 & 1994) *Environmental Almanac*. New York: Houghton Mifflin Company.

Worldmark. (1988). *Encyclopaedia of the Nations*, Volume 1–5. New York: John Wiley and Sons Inc.

### Community Resources

#### The International Trade Centre

The Business Service Centre at the trade centre is a resource filled with free literature and a reference section of books, magazines, documents and videos. As a student, you can visit the centre when doing your research. There are tables to work at while researching and a TV/VCR for previewing videos. A few students at a time is recommended. The addresses for both Calgary and Edmonton follows.

International Trade Centre
Business Service Centre
11th Floor, 510 – 5th Street SW
Calgary, AB T2P 3S2
Telephone: 292–4575 Fax: 292–4578

OR

International Trade Centre
Business Service Centre
540, Canada Place
9700 – Jasper Avenue
Edmonton, AB T5J 4C3
Telephone: 495–2944 Fax: 495–4507


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## SECTION I

**I. Basic facts about each country**

A. Geographic area—should include a map indicating where the country is located, its borders and major cities
B. Demographics of each country—population and principal cities, market size, income distribution
C. Overview of the history of each country
D. Education
E. Government and laws

**II. Economic facts about each country**

A. Economic system and membership in trading blocs and other international organizations
B. Exports, imports, chief agriculture products
C. Financial information—foreign exchange/currency, payment methods and licencing information
D. Transportation—modes available for shipping and transporting goods
E. Advertising and promotion—availability of print and electronic media

**III. Culture of each country**

A. Language—especially the language of business people and government officials
B. Customs affecting business relations
C. Religions of the country
D. Holidays
E. Etiquette for business in the country

**IV. Travelling information for each country**

A. Travel documents and customs regulations
B. Transportation to the country and domestic travelling arrangements during your visit
C. Communications
D. Hotel accommodations
E. Business calls and entertainment
F. Appropriate dress
G. Overall health and personal security

**V. Global Issues related to each country**

A. Environmental issues concerning land, air or water
B. Human rights issues related to the workforce or discriminating policies—related to gender, race or religion


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## SECTION II

**I. Comparisons between the developing and developed nation**

A. As a business person doing business with both countries, how are they similar?
B. How do they differ?

## SECTION III

**I. Import and Export Opportunities**

A. What are some of the potential opportunities for importing products or services into Canada from each country?
B. What are some of the potential opportunities for exporting products or services to each country?

**II. Recommendations and Conclusions**

A. What are the advantages and disadvantages for Canadians in doing business with each of these countries.?
B. What are the advantages and disadvantages for each country in doing business with Canadians?
C. Are there any global issues that make it difficult to do business with either of these two countries? This should be a discussion on the ethical and morale responsibilities that businesses have in the global marketplace towards human rights and environmental issues. Use the concept "profit with principles."
D. What did you value the most from this global research assignment? How might knowing this information make a difference for you in the future? (Each student should reflect on his or her own feelings.)


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Student(s)

| Task | Observations Of Student | | | | | |
|---|---|---|---|---|---|---|
| Planning and Presentation | 4 | 3 | 2 | 1 | 0 | N/A |
| Information Gathering and Processing | 4 | 3 | 2 | 1 | 0 | N/A |
| Content – Overview of Developed Nation | 4 | 3 | 2 | 1 | 0 | N/A |
| Content – Overview of Developing Nation | 4 | 3 | 2 | 1 | 0 | N/A |
| Content – Comparing the Two Nations | 4 | 3 | 2 | 1 | 0 | N/A |
| Content -Business Opportunities with each Nation | 4 | 3 | 2 | 1 | 0 | N/A |
| Collaboration and Teamwork | 4 | 3 | 2 | 1 | 0 | N/A |
| Information Sharing | 4 | 3 | 2 | 1 | 0 | N/A |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
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| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

*TASK CHECKLIST*

*The student:*

**Preparation and Planning**
- sets goals and establish steps to achieve them
- creates and adheres to useful timelines
- uses personal initiative to formulate questions and find answers
- plans and uses time effectively

**Information Gathering and Processing**
- accesses a range of relevant in-school/community resources
- uses a range of information-gathering techniques
- interprets, organizes and combines information into a logical sequence
- records information accurately with appropriate supporting detail and using correct technical terms
- determines accuracy/currency/reliability of information sources
- gathers and responds to feedback regarding approach to the task

**GLOBAL RESEARCH PROJECT**

**Content – gives overview of developed nation**
- selects a developed nation to research potential business opportunities
- provides basic facts regarding geography, economics, culture/customs, travel information, global issues (e.g., human rights, environmental)

**Content (continued) – gives overview of developing nation**
- selects a developing nation to research potential business opportunities
- provides basic facts regarding geography, economics, culture/customs, travel information, global issues (e.g. human rights, environmental)

**Content – compares the two nations**
- presents the similarities between the two nations
- presents the differences between the two nations

**Content – presents potential business opportunities with each nation including**
- import/export opportunities for each
- advantages and disadvantages of doing business with each
- recommendations for doing business with each

**Collaboration and Teamwork**
- cooperates with group members
- shares work appropriately among group members
- negotiates solutions to problems

**Information Sharing**
- demonstrates effective use of two or more communication media
  *e.g., written, oral, audio-visual*
- communicates ideas in a logical sequence with sufficient supporting detail
- maintains acceptable grammatical and technical standards
- cites five or more relevant information sources

**REFLECTIONS/COMMENTS**


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**ASSESSMENT TASK: OBSERVE AND CRITIQUE SALES PRESENTATIONS** **MAM3040–1**

Student Name(s) _____

**Standard:** critique a **minimum of 3 salespersons** using one or more of the following situations (in person, from video, through case studies). Complete all sections below.

| Salesperson 1 | Salesperson 2 | Salesperson 3 |
|---|---|---|
| Situation: in person/video/case study<br>Store/Company/Resource: | Situation: in person/video/case study<br>Store/Company/Resource: | Situation: in person/video/case study<br>Store/Company/Resource: |
| Did you notice the following characteristics?<br>Excellent / No Impression / Poor<br>☐ ☐ ☐ Appearance<br>☐ ☐ ☐ Enthusiasm<br>☐ ☐ ☐ Voice and Speech<br>☐ ☐ ☐ Tact and Self-control | Did you notice the following characteristics?<br>Excellent / No Impression / Poor<br>☐ ☐ ☐ Appearance<br>☐ ☐ ☐ Enthusiasm<br>☐ ☐ ☐ Voice and Speech<br>☐ ☐ ☐ Tact and Self-control | Did you notice the following characteristics?<br>Excellent / No Impression / Poor<br>☐ ☐ ☐ Appearance<br>☐ ☐ ☐ Enthusiasm<br>☐ ☐ ☐ Voice and Speech<br>☐ ☐ ☐ Tact and Self-control |
| Where you satisfied with the salesperson's:<br>Yes / No<br>☐ ☐ Approach<br>☐ ☐ Initiative and helpfulness<br>☐ ☐ Genuine interest in satisfying needs and wants<br>☐ ☐ Answers to questions/concerns<br>☐ ☐ Finalizing sale (ringing up/taking leave) | Where you satisfied with the salesperson's:<br>Yes / No<br>☐ ☐ Approach<br>☐ ☐ Initiative and helpfulness<br>☐ ☐ Genuine interest in satisfying needs and wants<br>☐ ☐ Answers to questions/concerns<br>☐ ☐ Finalizing sale (ringing up/taking leave) | Where you satisfied with the salesperson's:<br>Yes / No<br>☐ ☐ Approach<br>☐ ☐ Initiative and helpfulness<br>☐ ☐ Genuine interest in satisfying needs and wants<br>☐ ☐ Answers to questions/concerns<br>☐ ☐ Finalizing sale (ringing up/taking leave) |
| Comment on the strengths of the salesperson. | Comment on the strengths of the salesperson. | Comment on the strengths of the salesperson. |
| Comment on the weaknesses of the salesperson. | Comment on the weaknesses of the salesperson. | Comment on the weaknesses of the salesperson. |
| Would you buy from this person? Why? Why Not? | Would you buy from this person? Why? Why Not? | Would you buy from this person? Why? Why Not? |


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STUDENT: _____ PRODUCT BEING DEMONSTRATED: _____ CUSTOMER TYPE: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| | **APPROACHES THE CUSTOMER** |
| 4<br>3<br>2<br>1<br>0 | ☐ displays merchandise and sets up for the situation (store, type of sale)<br>☐ uses appropriate body language (enthusiasm, confidence, sincerity)<br>☐ uses correct approach for the situation (social, service, merchandise)<br>☐ demonstrates voice control (confident, clear, not too fast, does not use slang) |
| | **PRESENTS THE PRODUCT** |
| 4<br>3<br>2<br>1<br>0 | ☐ identifies customer's needs and wants (asks questions, listens)<br>☐ demonstrates the product – presentation evolves around the type of customer and his or her needs and wants, builds anticipated objections into presentation<br>☐ involves the customer in the presentation of product<br>☐ turns product features into customer benefits |
| | **HANDLES CUSTOMER OBJECTIONS/SUGGESTION SELLING** |
| 4<br>3<br>2<br>1<br>0 | ☐ listens and responds to customer objections<br>☐ resolves objections with tact and courtesy, customer interacts<br>☐ turns objection into selling points<br>☐ suggests and presents related merchandise<br>☐ demonstrates product knowledge |
| | **CLOSES AND TAKES LEAVE OF THE CUSTOMER** |
| 4<br>3<br>2<br>1<br>0 | ☐ takes initiative to close the sales<br>☐ closes the sale in a smooth, natural and timely manner<br>☐ accurately completes the mechanics of closing (ringing in the sale and/or preparation of sales slip, merchandise wrapped)<br>☐ offers a positive final statement to customer as he or she leaves |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
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| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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**ASSESSMENT TASK: COMPARING MODES OF TRANSPORTATION** **MAM3050–1**

Student:_____ Standard: Complete all information required in the chart below.

| 1. Rank each mode of transportation from (1) most favourable to (7) least favourable for each of the following | Mail | Courier | Water | Pipe | Rail | Truck | Air |
|---|---|---|---|---|---|---|---|
| Cost | | | | | | | |
| Speed | | | | | | | |
| Chance of theft/damage | | | | | | | |
| 2. Describe the convenience of delivery for each mode of transportation. (e.g., pickup vs. door-to-door service or special location necessary) | | | | | | | |
| 3. Describe typical products handled. | | | | | | | |
| 4. Explain and give examples of innovative packaging or handling available to facilitate the use of two or more modes of transportation | | | | | | | |


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## ASSESSMENT TASK: EXAMINE TYPES OF RETAILING — MAM3050–2

**Standard: Complete all information required in the chart below.**

**Student Name(s)**_____

| Types of Retailing | Name of a business offering this type of retailing | Describe product(s) and/or service(s) carried by business |
|---|---|---|
| 1. General Store | | |
| 2. Convenience Store | | |
| 3. Department Store | | |
| 4. Supermarket | | |
| 5. Superstore | | |
| 6. Discount Houses:<br>a. Discount Store | | |
| b. Catalogue Showroom | | |
| c. Warehouse Store | | |
| d. Wholesale Warehouse Club | | |
| e. Clearance Store | | |
| 7. Specialty Store | | |
| 8. Itinerant Store | | |
| 9. Factory Outlet | | |
| 10. Mail Order Selling | | |
| 11. Direct Selling | | |
| 12. Telemarketing | | |
| 13. Automatic Vending | | |
| 14. Network Marketing | | |
| 15. Internet Home Shopping | | |


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STUDENT: _____ NAME OF MANUFACTURED PRODUCT: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **Creativity** (text and visuals)<br>☐ gives an easy-to-follow and complete presentation of the product from its raw material stage to its consumable stage<br>☐ visually presents the product with a neat, clean and uncluttered look<br>☐ incorporates original, unique and clever ideas into presentation<br>☐ makes use of both visual and text formats |
| 4<br>3<br>2<br>1<br>0 | **Producers**<br>☐ researches and presents three main raw materials (comes from the ground or above the ground, e.g., coal, wheat)<br>☐ lists three producers of the three main raw materials; e.g., flour mill<br>☐ identifies actual names of producers |
| 4<br>3<br>2<br>1<br>0 | **Manufacturer and Middlemen**<br>☐ presents manufacturer w/address<br>☐ presents wholesaler w/address (if applicable)<br>☐ presents additional agents or brokers (if applicable)<br>☐ presents selected retailer w/address |
| 4<br>3<br>2<br>1<br>0 | **Modes of Transportation**<br>☐ identifies transportation methods used at the producer stage<br>☐ identifies transportation methods used by the manufacturer<br>☐ identifies transportation methods used between middlemen |
| 4<br>3<br>2<br>1<br>0 | **Presentation of Research**<br>☐ describes how product was selected and choice of visual<br>☐ describes how research was completed (where you looked, went and who you talked to for specific product information and/or educated guesses made because of lack of information)<br>☐ relates high points and frustrations encountered in completing the research for the presentation<br>☐ describes the channels of distribution for the product |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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STUDENT: _____ NAME OF RETAIL STORE: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **PART I** – creates an image for a retail store<br>☐ selects a specialty retail store<br>☐ identifies the market niche:<br>• products and services<br>• price range and quality<br>• target market<br>☐ lists the distinguishing features and characteristics of the store (policies & procedures)<br>☐ chooses a name for the retail store |
| 4<br>3<br>2<br>1<br>0 | **PART II** – analyzes and justifies a location and site<br>☐ selects a location and site taking the following into consideration:<br>• image<br>• traffic patterns/parking/public transportation access<br>• rent/lease options/costs<br>• location of competition/appropriate community |
| 4<br>3<br>2<br>1<br>0 | **PART III** – prepares an exterior/interior layout using design principles<br>☐ designs an attractive store front to scale, which portrays the store's image:<br>• graphics/logo/signage/display windows<br>• colours/texture<br>• entrance location and size<br>☐ analyzes necessary layout requirements with respect to space available, merchandising strategies/traffic flow and security for:<br>• cash register<br>• storage areas/change areas (if applicable)<br>• furniture and store fixtures/lighting<br>☐ designs and creates an effective and efficient floor plan to scale with considerations to:<br>• customer service<br>• security and safety<br>• image<br>• traffic flow/convenience/maintenance |
| 4<br>3<br>2<br>1<br>0 | **PART IV** – identifies interior furnishings, recommends vendors and prepares maintenance schedules<br>☐ prepares a list of furniture/fixtures/equipment and supplies along with the names of vendors for purchasing<br>☐ prepares a schedule for daily cleaning, general maintenance and upkeep of visual merchandising and redecorating |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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**Student(s):** _____

| Task | Observations Of Student | | | | | |
|---|---|---|---|---|---|---|
| Planning and Presentation | 4 | 3 | 2 | 1 | 0 | N/A |
| Information Gathering and Processing | 4 | 3 | 2 | 1 | 0 | N/A |
| Content | 4 | 3 | 2 | 1 | 0 | N/A |
| Collaboration and Teamwork | 4 | 3 | 2 | 1 | 0 | N/A |
| Information Sharing | 4 | 3 | 2 | 1 | 0 | N/A |

**STANDARD IS 3 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

*TASK CHECKLIST*

*The student:*

**Preparation and Planning**
- sets goals and establish steps to achieve them
- creates and adheres to useful timelines
- uses personal initiative to formulate questions and find answers
- plans and uses time effectively

**Information Gathering and Processing**
- accesses a range of relevant in-school/community resources
- uses a range of information-gathering techniques
- interprets, organizes and combines information into a logical sequence
- records information accurately with appropriate supporting detail and using correct technical terms
- determines accuracy/currency/reliability of information sources
- gathers and responds to feedback regarding approach to the task

**Content** – evaluates policies and procedures used for improving the quality of office environments to keep pace with change. Policies and procedures to consider include:
- interpersonal communications
- upgrading hardware and software

**Content** (continued)
- upgrading other electronic office equipment
- training staff on new technologies
- redefining roles and responsibilities of staff
- ensuring a safe and healthy work environment
- strategies used for increasing productivity:
  - project work teams
  - time and work management (setting priorities)
  - resource management
- recommend common policies and procedures that would be useful for office managers when implementing change

**Collaboration and Teamwork**
- cooperates with group members
- shares work appropriately among group members
- negotiates solutions to problems

**Information Sharing**
- demonstrates effective use of two or more communication media
  *e.g., written, oral, audio-visual*
- communicates ideas in a logical sequence with sufficient supporting detail
- maintains acceptable grammatical and technical standards
- cites five or more relevant information sources

**REFLECTIONS/COMMENTS**


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STUDENT TRAINOR: Names of Trainees:

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **Preparation and Planning**<br>☐ prepares self for training task<br>☐ organizes and works in orderly manner<br>☐ interprets and carries out instructions accurately<br>☐ plans and uses time effectively in a logical sequence<br>☐ displays leadership in adhering to routine procedures<br>☐ attempts to solve problems prior to requesting help |
| 4<br>3<br>2<br>1<br>0 | **Trains others on use of Equipment and Materials**<br>☐ make and model of office equipment used to train others<br>1. _____<br>2. _____<br>3. _____<br>☐ relates policies and procedures regarding use of equipment<br>☐ provides instructions on safe and efficient use of electronic equipment<br>☐ gives advice regarding necessary upkeep, repairs and reordering of supplies<br>☐ presents strategies to minimize waste of supplies<br>☐ evaluates the trainees' use of equipment and gives feedback on their performance |
| 4<br>3<br>2<br>1<br>0 | **Works Collaboratively**<br>☐ cooperates with group members<br>☐ shares work appropriately among group members<br>☐ negotiates with sensitivity, solutions to problems<br>☐ displays effective communication skills |

**STANDARD IS 3 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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STUDENT: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **Preparation and Planning**<br>☐ sets goals and describes steps to achieve them<br>☐ uses personal initiative to formulate questions and find answers<br>☐ accesses a range of relevant information sources and recognize when additional information is required<br>☐ interprets, organizes and combines information in creative and thoughtful ways<br>☐ records information accurately using appropriate technical terms and supporting detail<br>☐ plans and uses time effectively, prioritizing tasks on a consistent basis<br>☐ assesses and refines approach to task and project status based on feedback and reflection |
| 4<br>3<br>2<br>1<br>0 | **Content of Office Manual and/or Demonstration of Work Experience** - for electronic communication equipment<br>☐ describes and/or follows policies and procedures for the correct use of ***telephone*** including answering machines and voice mail<br>☐ describes and/or follows policies and procedures for the correct use of ***fax machines*** including the appropriate use of the system<br>☐ describes and/or follows policies and procedures for the correct use of ***electronic mail/Internet*** access including appropriate use of the system |
| 4<br>3<br>2<br>1<br>0 | **Presenting/Reporting (if applicable)**<br>☐ demonstrates effective use of a variety of communication media:<br>*e.g., Written: spelling, punctuation, grammar, format (formal/informal, technical/ literary)*<br>*Oral: voice projection, body language, appearance, enthusiasm, evidence of prior practice*<br>*Audio-visual: techniques, tools, clarity, speed and pacing*<br>☐ maintains acceptable grammatical and technical standards through proofreading and editing<br>☐ provides an introduction that describes the purpose and scope of the project<br>☐ communicates thoughts/feelings/ideas clearly to justify or challenge a position<br>☐ states a conclusion by analyzing and synthesizing the information gathered |

**STANDARD IS 3 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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STUDENTS: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **Preparation and Planning**<br>☐ prepares self for task<br>☐ organizes and works in orderly manner<br>☐ interprets and carries out instructions accurately<br>☐ plans and uses time effectively in a logical sequence<br>☐ displays leadership in adhering to routine procedures<br>☐ attempts to solve problems prior to requesting help |
| 4<br>3<br>2<br>1<br>0 | **Plan and Run a Business Meeting**<br>☐ identify reason for calling meeting<br>☐ plan an agenda including time, location and facilities and items to be discussed<br>☐ prepare for meeting—facilities, support materials and supplies, refreshments<br>☐ show use of efficient and effective strategies during the meeting (adhering to agenda, give equal time to all during discussions, use of Robert's Rules of Order or other predetermined rules)<br>☐ complete follow-up tasks; e.g., minutes, phone calls, etc. |
| 4<br>3<br>2<br>1<br>0 | **Works Collaboratively**<br>☐ cooperates with group members<br>☐ shares work appropriately among group members<br>☐ negotiates with sensitivity, solutions to problems<br>☐ displays effective communication skills |

**STANDARD IS 3 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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**ASSESSMENT TASK: RECORDS MANAGEMENT PROJECT** **MAM3090–1**

STUDENT: _____ TRAINING SITE: _____

| Observation of Student | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **Prepares and Plans a Records Management System**<br>☐ chooses records to be managed electronically (e.g. collection of CDs, videos and electronic games, sports cards or other collectible, statistics for sports teams)<br>☐ identifies who will use the records management system<br>☐ completes a records management plan identifying the categories and fields that will allow the system to be queried:<br>– alphabetically<br>– by subject<br>– geographically<br>– numerically<br>☐ organizes and works in an orderly manner<br>☐ demonstrates proper office etiquette<br>☐ plans and uses time effectively<br>☐ adheres to routine records management procedures |
| 4<br>3<br>2<br>1<br>0 | **Implements a Records Management System**<br>☐ creates a records template<br>☐ indexes data<br>☐ inputs data onto records<br>☐ sorts by methods requested |
| 4<br>3<br>2<br>1<br>0 | **Queries and Produces Reports from a Records Management System**<br>☐ queries records to produce a(n):<br>– alphabetic report<br>– subject report<br>– geographic report<br>– numeric report<br>☐ analyses strategies used in planning the records management system<br>☐ makes recommendations for improving the system |

**STANDARD IS 2 EACH APPLICABLE TASK with 80% accuracy**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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STUDENT NAME(S): _____

PURPOSE OF RECORDS MANAGEMENT SYSTEM: _____

INTENDED USER(S): _____

| Categories | Field Names | Indexing Order | Field Type | Field Length |
|---|---|---|---|---|
| | | | | |
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STUDENT: _____

| Observations of Student | CRITERIA<br>Investigate and report on basic broadcast media concepts. *The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | ☐ **Preparation and Planning**<br>• sets goals and describes steps to achieve them<br>• uses personal initiative to formulate questions and find answers<br>• accesses a range of relevant in-school/community resources<br>• interprets, organizes and combines information into a logical sequence<br>• records information accurately with appropriate supporting detail and using correct technical terms<br>• plans and uses time effectively<br>• gathers and responds to feedback regarding approach to task and project status |
| 4<br>3<br>2<br>1<br>0 | **Content** – prepares a report consisting of a minimum of three of the following:<br>☐ types of broadcast advertising<br>☐ role of the CRTC<br>☐ history of radio and television<br>☐ types of ownership and programming found in radio and television<br>☐ identifies a variety of radio stations and their target market in local marketplace<br>☐ investigate emerging broadcast advertising medium, pay-TV, video cassette, movies, infomercials, etc. |
| 4<br>3<br>2<br>1<br>0 | ☐ **Presenting/Reporting**<br>• demonstrates effective use of at least two communication media<br>*e.g., Written: spelling, punctuation, grammar, format (formal/informal)*<br>*Oral: voice projection, body language, appearance*<br>*Audio-visual: techniques, tools, clarity*<br>• maintains acceptable grammatical and technical standards through proofreading and editing<br>• provides an introduction that describes the purpose and scope of the project<br>• communicates ideas into a logical sequence with sufficient supporting detail<br>• states a conclusion by synthesizing the information gathered<br>• provides a reference list that includes five or more relevant information sources |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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## ASSESSMENT TASK: EVALUATION OF RADIO AND TELEVISION COMMERCIALS — MAM3100–2

**Student Name(s)** _____

**Standard:** **collect and evaluate a minimum of three commercials, complete all sections below.**

| Commercial 1 | Commercial 2 | Commercial 3 |
|---|---|---|
| **Type of medium and station:** (radio or television) | **Type of medium and station:** (radio or television) | **Type of medium and station:** (radio or television) |
| List time slot and length: (When and Where) | List time slot and length: (When and Where) | List time slot and length: (When and Where) |
| Identify target audience. | Identify target audience. | Identify target audience. |
| Explain objective and buying motive. | Explain objective and buying motive. | Explain objective and buying motive. |
| Identify type of commercial. (testimonial, announcement, etc.) | Identify type of commercial. (testimonial, announcement, etc.) | Identify type of commercial. (testimonial, announcement, etc.) |
| Comment on use of AIDA concept. | Comment on use of AIDA concept. | Comment on use of AIDA concept. |
| Identify elements presented in the advertisement:<br>☐ originality – creative, fresh, clever<br>☐ impact on the viewer/listener<br>☐ clear audio (voices, music, special effects)<br>☐ good flow/smoothness/continuity<br>☐ customer identifies with product | Identify elements presented in the advertisement:<br>☐ originality – creative, fresh, clever<br>☐ impact on the viewer/listener<br>☐ clear audio (voices, music, special effects)<br>☐ good flow/smoothness/continuity<br>☐ customer identifies with product | Identify elements presented in the advertisement:<br>☐ originality – creative, fresh, clever<br>☐ impact on the viewer/listener<br>☐ clear audio (voices, music, special effects)<br>☐ good flow/smoothness/continuity<br>☐ customer identifies with product |
| Comment on the overall presentation. | Comment on the overall presentation. | Comment on the overall presentation. |


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STUDENT: _____ TITLE OF COMMERCIAL: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **Written Script**<br>☐ organizes format including dialogue, sound effects and special instructions noted<br>☐ uses attractive, easy-to-read format |
| 4<br>3<br>2<br>1<br>0 | **Content of Commercial**<br>☐ originality–creative, fresh, clever<br>☐ impact–the ad is believable<br>☐ attracts attention by a strong opening<br>☐ builds interest by focusing on a single big idea (make every word count)<br>☐ arouses desire by promoting customer benefits (emotional involvement, repeat major points)<br>☐ induces action by creating an urgency to buy now and/or gives address, phone number, hours of operation |
| 4<br>3<br>2<br>1<br>0 | **Technical Excellence**<br>☐ commercial does not exceed 15-, 30- or 60-second assigned air time<br>☐ audio is clear including voices, music and special effects<br>☐ smoothness or continuity exists throughout<br>☐ customer can easily identify the product being advertised |
| 4<br>3<br>2<br>1<br>0 | **Oral Presentation**<br>☐ explained objective, target audience and buying motives<br>☐ justified time slot and station selected<br>☐ explained type of commercial (straight announcement, testimonial, jingle, etc.)<br>☐ described how the AIDA concept was used in the production of commercial |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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STUDENT: _____ TITLE OF COMMERCIAL: _____

| Observations of Student | CRITERIA<br>*The student:* |
|---|---|
| 4<br>3<br>2<br>1<br>0 | **Storyboard**<br>☐ illustrates of each shot with dialogue (illustration should convey what the shots are about)<br>☐ describes type and length of shot<br>☐ includes special instructions for effects when producing the shot |
| 4<br>3<br>2<br>1<br>0 | **Content of Commercial**<br>☐ originality – creative, fresh, clever<br>☐ impact – the ad is believable<br>☐ attracts attention by a strong opening<br>☐ builds interest by focusing on a single big idea (make every shot count)<br>☐ arouses desire by promoting customer benefits (emotional involvement, repeat major points)<br>☐ induces action by creating an urgency to buy now and/or gives address, phone number, hours of operation |
| 4<br>3<br>2<br>1<br>0 | **Technical Excellence**<br>☐ commercial does not exceed 15-, 30- or 60-second assigned air time<br>☐ visuals and audio are clear<br>☐ editing is evident, creates an illusion of reality by cutting out the dead parts; presents interesting action-oriented shots<br>☐ smoothness or continuity exists throughout<br>☐ customers can easily identify the product being advertised |
| 4<br>3<br>2<br>1<br>0 | **Oral Presentation**<br>☐ explains objective, target audience and buying motives<br>☐ justifies time slot<br>☐ describes how the AIDA concept was used in the production of the commercial |

**STANDARD IS 2 IN EACH APPLICABLE TASK**

**Rating Scale**

*The student:*

| | |
|---|---|
| **4** | Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. |
| **3** | Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. |
| **2** | Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. |
| **1** | Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. |
| **0** | Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately. |

**REFLECTIONS/COMMENTS**


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# MANAGEMENT AND MARKETING

## SECTION H: LINKAGES/TRANSITIONS

This section of the Guide has been designed to provide an overview of linkages and transitions of CTS modules with a number of organizations. The charts and information presented in this section will assist CTS students and teachers in understanding the potential application of CTS modules as students move into the workplace.

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# LINKAGES/TRANSITIONS

## LINKAGES

### With Other CTS Strands

In Management and Marketing, students have the opportunity to develop knowledge, skills and attitudes in business management, marketing and information management. Students are encouraged to link the competencies they have developed in these areas to other CTS strands. Linkages exist with other strands where products are produced and services are offered. Management and Marketing modules can be linked with these strands in order to successfully market these products and services to the ultimate consumer.

Potential linkages of Management and Marketing with other CTS strands, determined by course emphasis and area of specialization, are identified in this section (see Management and Marketing: Connections with Other CTS Strands and "Management and Marketing in Junior High").

The following chart outlines potential linkages.

| Strand | Themes and/or Modules |
|---|---|
| Agriculture | Modules in the technology and applications theme that focus on production of consumable products and customer services. |
| Career Transitions | Project modules can be used to provide students with extended time for developing skills in a variety of management and marketing areas. Leadership modules link with Managing for Quality. |
| Communication Technology | Promotion: Advertising links with all themes in Communication Technology. |
| Community Health | Providing caregiving as a service in business links with business and marketing system and strategies themes. |
| Construction Technologies | Modules in building and manufacturing themes that focus on production of consumable products and customer services. |
| Cosmetology Studies | Modules in Cosmetology that involve customer service have strong linkages to the retail modules including Customer Service, Retail Operations, Setting up a Retail Store. |
| Design Studies | Promotion: Visual Merchandising and Advertising have strong linkages to the design process. Elements and principles of design and layout are incorporated into both modules. |
| Electro–Technologies | Modules in all themes that focus on production of consumable products and customer services. Repair/Maintenance and Computer Technology are examples of two modules that can offer services to customers. |


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| Strand | Themes and/or Modules |
|---|---|
| Energy and Mines | Modules in the technology and applications theme that focus on production of consumable products and customer service. |
| Enterprise and Innovation ★ | All modules in Enterprise and Innovation link directly to Management and Marketing modules in the Business and Marketing Systems and Strategies theme. See later in this section for expanded scope and sequence and suggested planning for integrating these two strands at the junior and senior high level. |
| Fabrication Studies | Modules in the Fabrication Processes and Production Systems and Processes themes that focus on production of consumable products and customer service. |
| Fashion Studies ★ | Business/Merchandising modules in Fashion Studies have strong linkages to the modules in the Marketing Systems and Strategies theme. |
| Financial Management | Establishing an Accounting System for a Service or Merchandising Business and Advanced Financial Accounting Procedures and Financial Statements have strong linkages with the Marketing Systems and Strategies theme. |
| Foods | Modules in Foods that involve customer service have strong linkages with the retail modules including Customer Service, Retail Operations, Setting up a Retail Store. |
| Forestry | Harvesting and Forest Products and The Forest Marketplace modules link with the marketing systems and strategies themes. |
| Information Processing ★ | Most modules in the Information Processing strand have strong linkages with the Information Management Systems and Strategies theme. |
| Logistics | Logistics is the movement of goods from the producer to the consumer. Marketing has strong linkages with all the modules within this strand. It links directly with the submix "place" within the marketing mix. |
| Legal Studies | Laws relating to business have strong linkages to all Management and Marketing themes. Modules that have strong links include Labour Law, Consumer and Property Law, Laws Affecting Small Business. |
| Mechanics | Modules in all themes that focus on production of consumable products and customer services. Vehicle Care and Vehicle Maintenance are examples of two modules. |
| Tourism | Modules that involve customer service have strong linkages with the retail modules including Customer Service, Retail Operations, Setting up a Retail Store. |

★ Elaboration on these linkages is provided on the following pages.

### *Linking With Enterprise and Innovation: In Junior High*

The following four modules may be offered at the junior high level:

- Management and Marketing Basics
- Quality Customer Service
- Communication Strategies 1

These modules could also be combined with the following three Enterprise and Innovation modules:

- Challenge & Opportunity
- Planning the Venture
- Implementing the Venture (Intermediate level).


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When planning, it should be taken into consideration that the introductory Management and Marketing courses could act as a foundation to Enterprise and Innovation. Basic economic, management and marketing concepts are introduced in Management & Marketing Basics and basic consumer behaviour concepts in Quality Customer Service. As well, Quality Customer Service offers practical hands-on skills for entry-level retailing. All of these concepts can enhance the success of Enterprise and Innovation. The Information Highway I, from the Information Processing strand, could offer students the opportunity to search for existing business opportunities through the Internet. For schools wishing to offer a grade 7, 8 and 9 program, these six courses could be offered during a student's junior high career. Other courses from other strands that could enhance the study of Management and Marketing and Enterprise and Innovation include:

- Career Transition Project Courses (Introductory Level)
- Financial Management (Introductory Level)
- Logistics (Introductory Level courses).

*Linking With Enterprise and Innovation: In Senior High*

All introductory, intermediate and advanced courses may be offered to senior high students. However, some students may have some of the competencies identified through the following courses or involvement in:

- junior high Enterprise and Innovation/Management and Marketing courses
- school/community associations (e.g., Peer Support, Student Government, Junior Achievement)
- a family business
- an enterprising initiative of their own (e.g., lawn maintenance, snow removal, baby-sitting, house sitting, pet care).

Student may wish to challenge part or all of the general outcomes in certain courses.

Following are a few examples of possible course groupings that integrate the Business and Marketing Systems and Strategies theme in Management and Marketing with Enterprise and Innovation. (See the Extended Scope and Sequence chart in this section showing both strands).

At the introductory level, students can gain entry-level experience in management and marketing at the retail level. This gives them an opportunity for hands-on experience in a business. At the intermediate level, students can expand their experience to develop a venture of their own. During this time they can identify their strengths and weaknesses (e.g., management, sales, promotion, recordkeeping, finance). At the advanced level, students can select courses that develop their weaknesses or enhance their strengths.

*Introductory level (choose three to six courses):*

- Challenge & Opportunity
- Management & Marketing Basics
- Quality Customer Service.

Two additional Enterprise and Innovation courses focus on a venture:

- Planning a Venture
- Implementing the Venture.

Two additional Marketing and Management courses focus on entry-level retailing:

- Promotion: Visual Merchandising
- Retail Operations.


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*Intermediate level (choose three to six courses) with the focus on establishing a retail business:*

- Planning a Venture
- Managing the Venture
- Marketing the Venture
- Promotion: Visual Merchandising
- Promotion: Print Advertising
- Financing Ventures
- Retail Operations
- Setting Up a Retail Store
- Implementing the Venture.

*Advanced level (choose three to six courses) with the focus on Management*

- Managing for Quality
- The Business Organization
- Managing the Venture
- Business in the Global Marketplace
- Expanding the Venture
- One other course from ENT or MAM
- A leadership course from CTR.

*Advanced level (choose three to six courses) with the focus on Marketing:*

- Marketing the Venture
- Promotion: Broadcast Advertising
- Promotion: Sales Techniques
- Distributing of Goods and Services
- Setting Up a Retail Store
- plus one other course from ENT or MAM.

### *Linking With Logistics*

Logistics is the movement of goods from the producer to the consumer. It links directly with place, one of the four submixes in marketing. Within the place, submix decisions regarding distribution channels and modes of transportation to use are made. Courses that focus on place and that have strong links with Logistics include:

- Retail Operations
- Distributing of Goods and Services.

### *Linking With Fashion Studies*

The Fashion Studies business/merchandising theme links directly with the retail merchandising courses in the marketing systems and strategies theme of Management and Marketing. Specific courses include:

| | |
|---|---|
| Fashion | Fashion Merchandising |
| | Fashion Retailing |
| Marketing | Quality Customer Service |
| | Promotion: Print Advertising |
| | Promotion: Visual Merchandising |
| | Retail Operations |
| | Promotion: Broadcast Advertising |
| | Promotion: Sales Techniques |
| | Distributing of Goods and Services |
| | Setting up a Retail Store. |

Students interested in Fashion Merchandising should refer to the Fashion Studies linkages section for an extended scope and sequence.

### *Linking With Information Processing*

The information management systems and strategies theme of Management and Marketing links directly with Information Processing. Information management offers students the opportunity to learn basic knowledge, skills and attitudes necessary for success in today's office environment. Such learning links well with the learning of software and systems in the Information Processing strand. Note the prerequisites required to take many of these courses. Knowledge and skills of keyboarding, word processing and data bases are necessary for success in the information management courses. Following are a few examples of possible course groupings that integrate the two strands.

*Introductory level (choose three to six courses) might include:*

- Computer Operations
- Keyboarding 1
- Word Processing 1
- Database 1
- Communication Strategies 1
- Information Highway 1.


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*Intermediate level (choose three to six courses):*

- Keyboarding 2 or 3
- Word Processing 2
- Correspondence
- Office Systems 1
- Communication Strategies 2
- Reports
- Records Management 1.

*Advanced level (choose three to six courses):*

- Keyboarding 4
- Word Processing 3
- Sotware Integration 2
- Office Systems 2
- Communication Strategies 3
- Records Management 2.

*Multi-level (choose three to six courses) with a focus on Electronic Communications:*

- Computer Operations
- Information Highway 1
- Workstation Operations
- Local Area Networks
- Information Highway 2
- Hardware/Software Analysis.

This course grouping would be useful for students interested in understanding the technical aspects of the information highway as well as using it.

### With Other Secondary Programs

Management and Marketing has linkages with mathematics, language arts, economics and social studies. Depending on the venture selected, there may be linkages with numerous other courses. Potential linkages of Management and Marketing with other core and complementary subject areas across the curriculum are identified in this section (see "Management and Marketing: Connections Across the Curriculum").

## TRANSITIONS

### To the Community/Workplace

Information from the National Occupational Classification (NOC) regarding occupations in management and marketing-related areas that can be accessed upon completion of high school is provided in this section (see "Management and Marketing: Related Occupations").

The NOC chart indicates occupations for which Management and Marketing provides a foundation. High school students could potentially move into:

- seven occupations requiring a high school education
- 26 occupations that require further education at a college or technical institution (possibly obtaining advanced standing or preferred entrance in the post-secondary program)
- occupations that require further education at the university level (possibly obtaining preferred entrance into a program).

### To Related Post-secondary Programs

An outline of post-secondary institutions in Alberta currently offering programs in management and marketing-related areas is provided in "Management and Marketing: Summary of Related Post-secondary Programs."


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## LINKAGES - *Management and Marketing: Connections With Other CTS Strands*

| Management & Marketing Courses | Other CTS Strands: Agriculture | Career Transitions | Communication Technology | Community Health | Construction Technolgies | Cosmetology Studies | Design Studies | Energy and Mines | Electro Technologies | Enterprise and Innovation | Fashion Studies | Financial Management | Foods | Fabrication Studies | Forestry | Legal Studies | Logistics | Information Processing | Mechanics | Tourism Studies | Wildlife |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Theme: Business Management Systems and Strategies** | | | | | | | | | | | | | | | | | | | | | |
| MAM2010: Managing for Quality | | ■ | | | | | | | | ■ | | | | | | | | | | | |
| MAM3010: The Business Organization | | ■ | | | | | | | | ■ | | | | | | | | | | | |
| MAM3020: Business in the Canadian Economy | | | | | | | | | | ■ | | | | | | | | | | | |
| MAM3030: Business in the Global Marketplace | | | | | | | | | | ■ | | | | | | | | | | | |
| **Theme: Marketing Systems and Strategies** | | | | | | | | | | | | | | | | | | | | | |
| MAM1010: Management & Marketing Basics | | | | | | | | | | ■ | | | | | | | | | | | |
| MAM1020: Quality Customer Service | | | | | | | | | | ■ | | | | | | | | | | | |
| MAM2090: Promotion: Print Advertising | | | | | | | | | | ■ | ■ | | | | | | | | | | |
| MAM2030: Promotion: Visual Merchandising | | | | | | | | | | ■ | ■ | | | | | | | | | | |
| MAM2040: Retail Operations | | | | | | | | | | ■ | ■ | | | | | | | | | | |
| MAM3100: Promotion: Broadcast Advertising | | | | | | | | | | ■ | ■ | | | | | | | | | | |
| MAM3040: Promotion: Sales Techniques | | | | | | | | | | ■ | ■ | | | | | | | | | | |
| MAM3050: Distributing Goods & Services | | | | | | | | | | ■ | | | | | | | | | | | |
| MAM3060: Setting Up a Retail Store | | | | | | | | | | ■ | ■ | | | | | | | | | | |
| **Theme: Information Management Systems and Strategies** | | | | | | | | | | | | | | | | | | | | | |
| MAM1030: Communication Strategies 1 | | ■ | ■ | | | | | | | | | | | | | | | ■ | | | |
| MAM2050: Office Systems 1 | | | | | | | | | | | | | | | | | | ■ | | | |
| MAM2060: Communication Strategies 2 | | | ■ | | | | | | | ■ | | | | | | | | ■ | | | |
| MAM2080: Records Management 1 | | | | | | | | | | | | | | | | | | ■ | | | |
| MAM3070: Office Systems 2 | | | | | | | | | | | | | | | | | | ■ | | | |
| MAM3080: Communication Strategies 3 | | | ■ | | | | | | | ■ | | | | | | | | ■ | | | |
| MAM3090: Records Management 2 | | | | | | | | | | | | | | | | | | ■ | | | |

■ Provides many direct links with course content in this strand. Students will reinforce, extend and apply a substantial number of knowledge and/or skill components in practical situations.

▒ Provides some links with course content developed in this strand, usually through the application of related technologies and/or processes.


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## LINKAGES—*Management and Marketing in Junior High*

| Course Emphasis | Management & Marketing Courses | Enterprise & Innovation Courses | Information Processing Courses | Financial Management Courses |
|---|---|---|---|---|
| (Theme 1) Retailing (3 courses) | Management & Marketing Basics *MAM1010*<br>Quality Customer Service *MAM1020* | Challenge & Opportunity *ENT1010* | | |
| (Theme 2) Venture Planning (4 courses) | Management & Marketing Basics *MAM1010* | Challenge & Opportunity *ENT1010*<br>Planning a Venture *ENT1020* | | Financial Information *FIN1010* |
| (Theme 3) Communication (6 courses) | Communication Strategies 1 *MAM1030* | Challenge & Opportunity *ENT1010* | Computer Operations *INF1010*<br>Keyboarding 1 *INF1020*<br>Word Processing 1 *INF1030*<br>Information Highway 1 *INF1090* | |

| Course Emphasis | Management & Marketing Courses | Enterprise & Innovation Courses | Information Processing Courses | Tourism Studies Courses |
|---|---|---|---|---|
| (Theme 4) Tourism (5 courses) | Management & Marketing Basics *MAM1010* | Challenge & Opportunity *ENT1010* | | The Tourism Industry *TOU1010*<br>People & Places *TOU1020*<br>Quality Guest Service *TOU1030* |


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**LINKAGES** - *Management and Marketing: Connections Across the Curriculum*

**Across the Curriculum**

| Management & Marketing Courses | Junior High | | | | | | | Senior High | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Language Arts | Social Studies | Mathematics | Science | Health & PLS | Physical Education | Fine Arts | English | Social Studies | Mathematics | Science (General) | Biology | Chemistry | Physics | CALM | Physical Education | Fine Arts | Social Sciences | Second Language |
| **Theme: Business Management Systems and Strategies** | | | | | | | | | | | | | | | | | | | |
| MAM2010: Managing for Quality | | | | | | | | ▒ | ▒ | ▒ | ▒ | ▒ | ▒ | ▒ | ▒ | ▒ | ▒ | ▒ | ▒ |
| MAM3010: The Business Organization | | | | | | | | | | | | | | | | | | | |
| MAM3020: Business in the Canadian Economy | | | | | | | | | ■ | | | | | | | | | | |
| MAM3030: Business in the Global Marketplace | | | | | | | | | ■ | | | | | | | | | | |
| **Theme: Marketing Systems and Strategies** | | | | | | | | | | | | | | | | | | | |
| MAM1010: Management & Marketing Basics | | ■ | | | ■ | | ▒ | | | | | | | | | | ▒ | | |
| MAM1020: Quality Customer Service | | | ■ | | | | ▒ | | | | | | | | | | ▒ | | |
| MAM2090: Promotion: Print Advertising | | | | | | | ■ | | | | | | | | | | ■ | | |
| MAM2030: Promotion: Visual Merchandising | | | | | | | ■ | | | | | | | | | | ■ | | |
| MAM2040: Retail Operations | | | ■ | | | | | | | ■ | | | | | | | | | |
| MAM3100: Promotion: Broadcast Advertising | | | | | | | ■ | | | | | | | | | | ■ | | |
| MAM3040: Promotion: Sales Techniques | | | | | | | ■ | | | | | | | | | | ■ | | |
| MAM3050: Distributing Goods & Services | | | | | | | | | | | | | | | | | | | |
| MAM3060: Setting Up a Retail Store | | | | | | | | | | | | | | | | | | | |
| **Theme: Information Management Systems and Strategies** | | | | | | | | | | | | | | | | | | | |
| MAM1030: Communication Strategies 1 | ■ | | | | | | | ■ | | | | | | | | | | | |
| MAM2050: Office Systems 1 | | | | | | | | | | | | | | | | | | | |
| MAM2060: Communication Strategies 2 | | | | | | | | ■ | | | | | | | | | | | |
| MAM2080: Records Management 1 | | | | | | | | | | | | | | | | | | | |
| MAM3070: Office Systems 2 | | | | | | | | | | | | | | | | | | | |
| MAM3080: Communication Strategies 3 | | | | | | | | ■ | | | | | | | | | | | |
| MAM3090: Records Management 2 | | | | | | | | | | | | | | | | | | | |

■ Provides many direct links with course content. Students will reinforce, extend and apply a substantial number of knowledge and/or skill components in practical contexts.

▒ Provides some links with course content, usually through the application of related technologies and/or processes.


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## *Correlation of Management and Marketing to Practical Arts Courses ★: Business Studies 9, Basic Business 20–30, Office Procedures 20–30, Marketing 20–30*

| MANAGEMENT AND MARKETING MODULES | Business Studies 9 | Basic Business 20-30 | | | | | | | | Office Procedures 20-30 | | | | | | | | | | Marketing 20-30 | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Canadian Business | Consumer Credit | Insurance | Economic Concepts | Small Business Management | Management Techniques | Personal Financial Planning | Small Business Management II | The Structure of the Business Office | Personnel in the Business Office | Business Communication | Records Management | Information Processing | Clerical Routines | Secretarial Routines | Office Specialties I | Office Specialties II | Office Simulation | World of Marketing | Advertising and Sales Promotion | Distribution of Goods and Services | Marketing Research | Pricing and Financial Activities | Selling | Display | Purchasing and Controlling Merchandise |
| MAM1010: Management & Marketing Basics | ✓ | ✓ | | | ✓ | ✓ | ✓ | | | ✓ | | | | | | | | | | ✓ | ✓ | ✓ | | ✓ | | | |
| MAM1020: Quality Customer Service | ✓ | ✓ | | | | | | | | | | | | ✓ | | | | | | | | | | | | | |
| MAM1030: Communication Strategies 1 | | ✓ | | | | | | | | | ✓ | ✓ | | | | | | | | | | | | | | | |
| MAM2010: Managing for Quality | | | | | | | ✓ | | | ✓ | | | | | | | | | | | | | | | | | |
| MAM2020: Promotion: Advertising | | ✓ | | | | | | | | | | | | | | | | | | ✓ | | | | | | | |
| MAM2030: Promotion: Visual Merchandising | | | | | | | | | | | | | | | | | | | | | | | | | ✓ | | |
| MAM2040: Retail Operations | | | | | | | | | | | | | | ✓ | | | | | | | | | ✓ | | | ✓ | |
| MAM2050: Office Systems 1 | | | | | | | | | | ✓ | ✓ | ✓ | | | ✓ | | | | | | | | | | | | |
| MAM2060: Communication Strategies 2 | | | | | | | | | | | ✓ | ✓ | | | | | | | | | | | | | | | |
| MAM2080: Records Management 1 | | | | | | | | | | | | | ✓ | | | | | | | | | | | | | | |
| MAM3010: The Business Organization | | ✓ | | | | | ✓ | | ✓ | ✓ | | | | | | | | | | | | | | | | | |
| MAM3020: Business in the Canadian Economy | | ✓ | | | ✓ | | | | | | | | | | | | | | ✓ | | | ✓ | | | | | |
| MAM3030: Business in the Global Marketplace | | ✓ | | | ✓ | ✓ | | | | | | | | | | | | | ✓ | | | | | | | | |
| MAM3040: Promotion: Sales Techniques | | | | | | | | | | | | ✓ | | ✓ | | | | | | | ✓ | | | ✓ | | | |
| MAM3050: Distributing Goods & Services | | | | | | | | | | | | | | | | | | | ✓ | | ✓ | | | | | | |
| MAM3060: Setting Up a Retail Store | | | | | | | | | | ✓ | | | | | | | | | | | | ✓ | | | | | |
| MAM3070: Office Systems 2 | | | | | | | | | | ✓ | ✓ | ✓ | | | ✓ | | | | | | | | | | | | |
| MAM3080: Communication Strategies 3 | | | | | | | | | | | | ✓ | | | | | | | | | | | | | | | |
| MAM3090: Records Management 2 | | | | | | | | | | | | | ✓ | | | | | | | | | | | | | | |

★ September 1997: All practical arts courses replaced by Career and Technology Studies.


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## TRANSITIONS — *Management and Marketing: Related Occupations*

Information for this chart was obtained from the National Occupational Classification (NOC) descriptions.

**Educational Requirements:**

D: High School Education
C: Apprenticeship
B: College or Vocational Education
A: University

| Occupation Profile | NOC# | D | C | B | A |
|---|---|---|---|---|---|
| Accommodation Services Manager | 0632 | | | ✓ | ✓ |
| Architecture and Science Managers | 0212 | | | ✓ | ✓ |
| Banking, Credit and Other Investment Managers | 0122 | | | ✓ | ✓ |
| Construction Manager | 0711 | | | | ✓ |
| Display Designer/Visual Merchandiser | 5243 | ✓ | | ✓ | |
| Economic Development Officers and Marketing Researchers and Consultants | 4163 | | | | ✓ |
| Engineering Manager | 0211 | | | | ✓ |
| Facility Operation Manager | 0721 | | | ✓ | ✓ |
| Financial Manager | 0111 | | | ✓ | ✓ |
| Information Systems and Data Processing Managers | 0213 | | | | ✓ |
| Insurance, Real Estate and Financial Brokerage Managers | 0121 | | | ✓ | ✓ |
| Maintenance Manager | 0722 | ✓ | | ✓ | ✓ |
| Manager in Health Care | 0411 | | | ✓ | ✓ |
| Managers in Publishing, Motion Pictures, Broadcasting and Performing Arts | 0512 | | | ✓ | ✓ |
| Managers in Social, Community and Correctional Services | 0411 | | | | ✓ |
| Marketing Manager | 0611 | | | ✓ | ✓ |
| Market Research Analyst | 4163 | | | ✓ | ✓ |
| Manufacturing Manager | 0911 | | | ✓ | ✓ |
| Operations Manager | 0122/0911 | | | ✓ | ✓ |
| Operations Research Analyst | 2161 | | | ✓ | ✓ |
| Other Administrative Services Managers | 0414 | | | ✓ | ✓ |
| Other Business Services Managers | 0123 | | | ✓ | ✓ |
| Other Services Managers | 0651 | ✓ | | ✓ | |
| Postal and Courier Services Managers | 0123 | | | ✓ | ✓ |
| Professional Occupations in Business Services to Management | 1122 | | | ✓ | ✓ |
| Property Management | 1224 | ✓ | | ✓ | ✓ |
| Purchasing Managers and Buyers | 0113 | | | ✓ | ✓ |
| Restaurant and Food Service Managers | 0631 | | | ✓ | ✓ |
| Sales, Marketing and Advertising Managers | 0611 | | | ✓ | ✓ |
| Telecommunication Carriers Managers | 0131 | | | | ✓ |
| Transportation Manager | 0713 | | | | ✓ |
| Utilities Manager | 0912 | | | ✓ | ✓ |
| Volunteer Manager | 4212 | | | ✓ | |


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# TRANSITIONS – *Management and Marketing: Summary of Related Post-secondary Programs* ★

| | PUBLIC COLLEGES | | | | | | | | | | | APPRENTICESHIP TRADE | PRIVATE COLLEGES | | | | | | TECH. INST. | | | UNIVERSITIES | | | | VOCATIONAL COLLEGES | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Alberta College of Art & Design | Fairview College | Grande Prairie Regional College | Grant MacEwan Community College | Keyano College | Lakeland College | Lethbridge Community College | Medicine Hat College | Mount Royal College | Olds College | Red Deer College | | Alberta College | Augustana University College | Canadian Union College | Concordia College | King's University College, The | North American Baptist College | Northern Alberta Institute of Technology | Southern Alberta Institute of Technology | Banff Centre | Athabasca University | University of Alberta | University of Calgary | University of Lethbridge | AVC - Calgary | AVC - Edmonton | AVC - Lac La Biche | AVC - Lesser Slave Lake |
| Accounting (certificate & diploma programs) | | | CD | CD | | D | CD | D | CD | | CD | | D(10 m) | | | | | | CD | CD | | C | C | C | D | C | C | C | |
| Administration (including Arts, Community Leadership, Construction, Early Childhood, Employee Benefits Planning, Health Services, Hotel/Restaraunt, Human Resource Management & Organizational Studies, Insurance, Labour Relations, Local Government) | | | CD | CD | | | CD | | CD | | | | | | | | | | VC | CD | V | CB (3y)B (4y) | VCD M | C | CBM | | | | |
| Advertising/Media Sales/Public Relations | | | | D | | | D | | D | | | | | | | | | | | VD | | | | | | | | | |
| Agriculture Business/Management | | CD | | | | D | CD | | | D | | | | | | | | | | | | | B | | CBM | | | | |
| Banking | | | | | | | | | | | | | | | | | | | C | | | | | | | | | | |
| Business Administration (certificate & diploma programs with various specializations) | | CD | CD | C | CD | D | CD | CD | CD | D | CD | | D(10 m) | | D | | | | D | CD | | C | | | C | | | C1t | C |
| Business/Business Administration & Commerce (including degree programs in Accounting, Finance, Human Resources, Industrial & Legal Relations, International Business, Management & Marketing) | | | 2t | 2t | 2t | 1t | V | 1t2t | 2t | | 2t | | | 1t | B | B2t | B | | | | | 2tB (3y) | BMP hD | BMP hD | BM | | | | |
| Clerical (including certificate and diploma programs in Accounting, Bookkeeping, Business Education, Clerk/Clerk Typist, Clerical Refresher & Teller Training) | | D | D | CD | | D | CD | D2t | D2t | CD | C2t | | | | B | | | | VC D | C | | C | | | | C | C | C | C |
| Computer Marketing & Business Administration | | | | | | | | | D | | | | | | | | | | | | | | | | | | | | |
| Computer/Microcomputer Accounting | | | CD | C | | | C | D | | | | | | | 1t | | | | VC | | | | | | | 4w | | C | |
| Court Reporter | | | | | | | | | | | | | | | | | | | D | | | | | | | | | | |
| Management (including certificate & diploma programs in Agriculture, Business Enterprises & Self Governing Systems of Native and Metis People, Computing Science, Economics, Info Systems, Insurance, International, Labour, Management, Marketing & Tourism) | | D | D | CD | | D | CD | D2t | D2t | CD | C2t | | | | B | | | | VC D | CD | V | B | C | C | CD | V | | | C |
| Medical-Clerical/Medical Transcription | | | | C | | | | | | | D | | VD | | C | | | | C | | | | | | | C | | | |
| Office Admin./Records Management | | C | CD | | CD | C | C | C | | C | CD | | | | | | | | CD | C | | | | | | | | | |
| Real Estate Appraisal & Assessment | | | | | | D | | | | D | | | | | | | | | | | | | VC | | | | | | |

CODES:

| | | | | | |
|---|---|---|---|---|---|
| B | Bachelor's Degree | D | Diploma (2 years) | w | weeks |
| M | Master's Degree | V | Varies | m | months |
| Ph.D. | Doctoral Degree | 1t | One-year transfer | y | years |
| C | Certificate (1 year or less) | 2t | Two-year transfer | | |

*Information adapted from "It's About Time: To Start Thinking About Your Future," Advanced Education and Career Development, 1995.


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# SECTION I:
# LEARNING RESOURCE GUIDE

This section of the GSI explains how to obtain up-to-date information regarding learning resources that have been identified to support the delivery of courses in this strand. It provides directions for searching, by electronic means, the most current information on:

- authorized student basic, support and authorized teaching resources—resources approved by Alberta Learning for use in this strand
- provincial software agreements—licensing agreements that allow school jurisdictions to purchase educational software at significantly reduced prices
- additional sources of information—other titles and information sources that may provide potentially useful ideas for courses in this strand.

The resource listings compiled for this strand are time sensitive and subject to change. Teachers are encouraged to browse the web sites identified in this guide on a regular basis for the most up-to-date information on new learning resources, more recent versions/editions and other sources of support.

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# NOTICE

## SECTION I: LEARNING RESOURCE GUIDE

Alberta Learning authorizes a variety of resources that support learning and teaching in this strand. The 1999 amendments to Section I provide directions for obtaining, by electronic means, up-to-date information about authorized resources and other sources of information.

Teachers are encouraged to browse the web sites identified in this guide on a regular basis for the most up-to-date information on:

- authorized resources; i.e., student basic, support, and authorized teaching
- provincial software licensing agreements
- additional sources of support.

The lists of authorized resources that were previously included in Section I have been removed from the 1999 amendments to this document. From 1999 onward, up-to-date listings of authorized resources are to be accessed through:

- the Learning Resources Distributing Centre *Buyers Guide*, available electronically at <http://ednet.edc.gov.ab.ca/lrdc>
- the Authorized Resources Database, available electronically at <http://ednet.edc.gov.ab.ca> under Students and Learning, Learning and Teaching Resources.

Subsequent amendments to the *Guide to Standards and Implementation* for other CTS strands will include similar changes to Section I.


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# LEARNING RESOURCE GUIDE

This section of the guide provides directions for obtaining, from electronic sources, up-to-date information about learning resources that support the delivery of CTS courses in this strand. Teachers may use the information to search for current listings of:

- authorized resources that support learning and teaching
  - basic learning resources
  - support learning resources
  - authorized teaching resources
- provincial software licensing agreements
- additional sources of information
  - other titles and sources that contain potentially useful information and ideas
  - web sites that may provide access to global networks of information.

Learning resources for this strand will continue to be updated in order to maintain and expand access to current information suitable for use in a variety of CTS learning environments.

## CTS AND THE RESOURCE-BASED CLASSROOM

CTS supports the development of resource-based classrooms where a variety of appropriate, up-to-date print and nonprint resources are available. This approach enables students to:

- interact with a wide range of information sources
- access and use information sources appropriately
- take an active role in managing their own learning.

CTS identifies learning resources in print, software, video and CDROM formats, as well as other sources of information available in the community and through the Internet.

Collaboration between the teacher–librarian and CTS teacher in planning resource-based research activities will ensure that students develop research skills as they increase their understanding of subject content. Planned and purposeful research activities will help students learn to gather, process and share information, and will require access to a range of current print and nonprint resources available in the school library, other libraries, the community and/or from other sources.

Teachers are encouraged to reference *Focus on Research: A Guide to Developing Students' Research Skills,* referenced in the Alberta Learning Monographs section of this guide, when planning research activities.

## LEARNING RESOURCE POLICY

Alberta Learning authorizes resources considered appropriate for provincial programs of study and that have met criteria for acceptability. The authorized resources for CTS include:

- student basic—resources that address the majority of the learner outcomes in one or more CTS courses
- student support—resources that assist in addressing some of the learner outcomes of a CTS course
- authorized teaching—resources that support the implementation of one or more CTS courses and assist teachers in the instructional process.

The Learning Technologies Branch also has developed distance education materials for a number of CTS courses. These course materials, also authorized by the province of Alberta, include a range of print and electronic products that can be used to support teaching and learning in CTS.

School boards may identify and approve instructional materials for use in their schools under section 44 (2) of the *School Act.* Many school boards have delegated the power to approve resources to school staff or other board employees under section 45 (1) of the *School Act.*


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For further information on resource policy and definitions, refer to the *Student Learning Resources Policy* and *Teaching Resources Policy* or contact:

Learning Resources Unit
Curriculum Standards Branch
Alberta Learning
5th Floor, Devonian Building, East Tower
11160 Jasper Avenue
Edmonton, AB, Canada T5K 0L2
Telephone: 780–422–4872 (to be connected toll free inside Alberta dial 310–0000)
Fax: 780–422–0576
Internet: <http://ednet.edc.gov.ab.ca>

## HOW TO OBTAIN UP-TO-DATE INFORMATION

### Authorized Resources

A searchable online index of all student basic, support and authorized teaching resources for courses in this CTS strand is provided through the Authorized Resources Database on the provincial web site. Each entry in the database provides bibliographic information about the resource, an annotation where appropriate, a correlation to specific one-credit courses in this strand, and information about how to obtain the resource.

The Authorized Resources Database can be accessed at <http://ednet.edc.gov.ab.ca>:

- click on "Students and Learning"
- select "Learning and Teaching Resources"
- then select the "Authorized Resources Database".

When using the database to search for resources within a particular CTS strand:

- enter the strand name as the "Curricular Area"
- select the desired "Format" and "Authorization Status" from the options provided
- click on "Submit".

The database begins each list of student basic, support and authorized teaching resources with those resources that been authorized most recently. Upon first entering the database, the user is provided with a title and brief description of each resource, accompanied with copyright information, authorization status, number of pages and intended use by curriculum area and grades. Then by clicking on the "More" icon, a more detailed description of each resource can be obtained, along with additional information regarding publisher/distributor, physical appearance, cost, correlation to individual CTS courses, how to obtain the resource and where the resource can be previewed.

Up-to-date information regarding the availability of distance education materials for CTS courses (i.e., print products, electronic products, products in development) can also be obtained through the web site:

- click on "Students and Learning"
- select "Learning and Teaching Resources"
- then select the "Learning Technologies Branch".

Teachers are encouraged to browse the Authorized Resources Database and Learning Technologies Branch Homepage on a regular basis for the most up-to-date information on authorized learning resources and distance education course materials that are available.

### Provincial Software Agreements

Due to frequent upgrades occurring in productivity software (e.g., software packages developed for word processing, spreadsheet, database, multimedia, drawing and design applications), this kind of software is no longer authorized by the department. However, a number of provincial licensing agreements for software products are in place that allow school jurisdictions to purchase productivity software at significantly reduced prices.

An up-to-date listing of provincial software agreements can be obtained through the "Technology" section of the web site. Teachers are encouraged to browse this listing on a regular basis for information regarding additional provincial software licensing agreements that may be established from time to time.


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## HOW TO ORDER AUTHORIZED RESOURCES

Most of the student basic, support and authorized teaching resources can be obtained from the Learning Resources Distributing Centre (LRDC). The LRDC *Buyer's Guide*, available in electronic or print formats, provides a complete listing of resources available for purchase and additional ordering information. The LRDC can be contacted at:

12360 – 142 Street
Edmonton, AB, Canada T5L 4X9
Telephone: 780–427–5775 (to be connected toll free inside Alberta dial 310–0000)
Fax: 780–422–9750
Internet: <http://ednet.edc.gov.ab.ca/lrdc>.

It is recommended that all resources be previewed prior to purchase. In some instances, teachers may find it desirable to purchase one copy for their reference and additional copies as required.

## ADDITIONAL SOURCES OF INFORMATION

There are many additional sources of information—other titles, and information available from government, professional associations, industry organizations and community agencies—that may provide potentially useful ideas for courses in this strand. Of further note are a number of web sites relevant to courses in this strand, which when used effectively, can provide both teachers and learners with a global network of useable information.

**The responsibility to evaluate these additional sources of information prior to selection rests with the user, in accordance with any existing local policy.**

### CTS Council

An online listing of additional sources of information relevant to courses in this strand is available on the CTS Council web site at <http://ctscouncil.com>. This site can be accessed through the CTS homepage by going to "Related Sites".

Each entry in this listing includes the name of the resource or agency/organization, appropriate distributor/contact information, and where possible a description of the materials/services available.

The CTS Council welcomes your suggestions for maintaining and expanding the sources of information that are shared through this site.

### Telus 2Learn Alliance

A searchable online listing of web sites containing information and materials relevant to courses in this strand is available through the Telus 2Learn Alliance at <http://www.2Learn.ca>. This site can also be accessed through the CTS homepage by going to "Related Sites".

The Telus 2Learn Alliance welcomes your feedback and ideas on these and other sites relevant to courses in this strand.

## OTHER SOURCES OF SUPPORT

### ACCESS: The Education Station

ACCESS: The Education Station offers a variety of resources and services to teachers. For a nominal dubbing and tape fee, ACCESS: The Education Station will copy audiotapes and videotapes for teachers.

ACCESS: The Education Station publishes listings of audiocassettes and videocassettes as well as a comprehensive programming schedule. For further information, visit their web site at <http://www.accesstv.ab.ca>.


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### National Film Board of Canada

The National Film Board of Canada (NFB) has numerous audiovisual resources that may be suitable for use in CTS courses. While these resources can be ordered directly from the NFB, many of their materials are also available in public libraries.

For a list of NFB audiovisual resources indexed by title and subject, or to place an order for audiovisual resources, visit their web site at <http://www.nfb.ca>.

### Media and Resource Centres

There are a number of urban media and regional resource centres across the province that provide on a loan basis instructional materials that may support CTS courses. Teachers are encouraged to contact their local media or resource centre for further information regarding services that are available.

Urban Media Centres

Calgary Board of Education
Calgary, AB, Canada
Web site: <www.cbe.ab.ca>

Calgary Separate School Board
Calgary, AB, Canada
Web site: <www.crcssd1.calgary.ab.ca>

Edmonton Catholic School District
Edmonton, AB, Canada
Web site: <www.ecs.edmonton.ab.ca>

Edmonton Public School Board
Edmonton, AB, Canada
Web site: <www.epsb.edmonton.ab.ca>

Elk Island Public School Division
Sherwood Park, AB, Canada
Web site: <www.ei.educ.ab.ca>

Medicine Hat School District
Medicine Hat, AB, Canada
Web site: <www.sd76.ab.ca>

Northern Lights School Division
Spirit River, AB, Canada
Web site: <www.nlsd.ab.ca>

Red Deer Public School District
Red Deer, AB, Canada
Web site: <www.rdpsd.ab.ca>

Regional Resource Centres

Zone 1
Zone One Regional Resource Centre
Peace River, AB, Canada
Web site: (not yet available)

Zone 2/3
Central Alberta Media Services
Sherwood Park, AB, Canada
Web site: <www.cams.ab.ca>

Zone 4
Parkland Regional Library
Lacombe, AB, Canada
Web site: <www.prl.lacombe.ab.ca>

Zone 5
South Central Alberta Resource Centre
Strathmore, AB, Canada
Web site: (available in September 1999)

Zone 6
Southern Alberta Learning Resource Centre
Lethbridge, AB, Canada
Web site: (available in July 1999)

## Alberta Learning Monographs

The following monographs are available for purchase from the Learning Resources Distributing Centre. Refer to the "Support Documents" section or the "Legal, Service and Information Publications" section in the LRDC *Buyers Guide* for ordering information and costs.

- *The Emerging Student: Relationships Among the Cognitive, Social and Physical Domains of Development,* 1991 (LRDC Product No. 161555)

  This document examines the child, or student, as a productive learner, integrating all the domains of development: cognitive, social and physical. It emphasizes the need for providing balanced curriculum and instruction.


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- *Students' Interactions Developmental Framework: The Social Sphere,* 1988 (LRDC Product No. 161399)

  This document examines children's perceptual, structural and motor development and how such physical development affects certain learning processes.

- *Focus on Research: A Guide to Developing Students' Research Skills,* 1990 (LRDC Product No. 161802)

  This document outlines a resource-based research model that helps students manage information effectively and efficiently, and gain skills that are transferable to school and work situations. This model provides a developmental approach to teaching students how to do research.

- *Teaching Thinking: Enhancing Learning,* 1990 (LRDC Product No. 161521)

  Principles and guidelines for cultivating thinking, ECS to Grade 12, have been developed in this resource. It offers a definition of thinking, describes nine basic principles on which the suggested practices are based, and discusses possible procedures for implementation in schools and classrooms.


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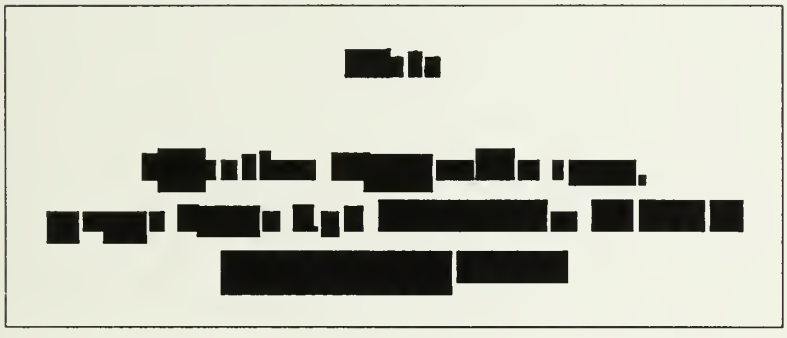
*[The 1997 text was deleted September 1999.]*

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# MANAGEMENT AND MARKETING

## SECTION J: SAMPLE STUDENT LEARNING GUIDES

The following pages provide background information, strategies and a template for developing student learning guides. Also included at the end of this section are several sample student learning guides for Management and Marketing.

A student learning guide provides information and direction to help students attain the expectations defined in a specified CTS module. It is designed to be used by students under the direction of a teacher.

Many excellent student learning guides (SLGs) are available for use and/or are in the process of being developed. While Alberta Education provides a development template accompanied by some samples, most student learning guide development is being done by individuals and organizations across the province (e.g., school jurisdictions, specialist councils, post-secondary organizations). Refer to the *Career & Technology Studies Manual for Administrators, Counsellors and Teachers* (Appendix 11) for further information regarding student learning guide developers and sources.

**Note**: A student learning guide is <u>not</u> a self-contained learning package (e.g., Distance Learning Module), such as you might receive from the Alberta Distance Learning Centre (ADLC) or Distance Learning Options South (DLOS).

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Components of a Student Learning Guide ..... J.3
Strategies for Developing Student Learning Guides ..... J.4

SAMPLE STUDENT LEARNING GUIDE TEMPLATE ..... J.5

SAMPLE STUDENT LEARNING GUIDES

MAM1010 Management & Marketing Basics ..... J.11
MAM3030 Business in the Global Marketplace ..... J.23




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## BACKGROUND INFORMATION

A Student Learning Guide (SLG) is a presentation of information and direction that will help students attain the expectations defined in a specified CTS module. It is designed to be used by students under the direction of a teacher. A SLG is not a self-contained learning package such as you might receive from the Alberta Distance Learning Centre (ADLC) or Distance Learning Options South (DLOS).

Each SLG is based on curriculum and assessment standards as defined for a particular CTS module. Curriculum and assessment standards are defined in this document through:

- module and specific learner expectations (Sections D, E and F)
- assessment criteria and conditions (Sections D, E and F)
- assessment tools (Section G).

The SLG is written with the student in mind and makes sense to the student in the context of his or her CTS program. SLGs are designed to guide students through modules under the direction of the teacher. They can be used to guide:

- an entire class
- a small groups of students
- individual students.

In some instances, the Student Learning Guide may also be used as teacher lesson plans. When using SLGs as teacher lesson plans, it should be noted that they tend to be:

- learner-centred (versus teacher-directed)
- activity-based (versus lecture-based)
- resource-based (versus textbook-based).

### Components of a Student Learning Guide

The student learning guide format, as developed by Alberta Education, typically has *seven* components as described below.

1. *Why Take This Module?*

   This section provides a brief rationale for the work the student will do, and also establishes a context for learning (i.e., in relation to the strand, a life pursuit, a specific industry, etc.).

2. *What Do You Need To Know Before You Start?*

   In this section, prerequisite knowledge, skills and attitudes considered necessary for success in the module are identified. Prerequisites may include other modules from within the strand or from related CTS strands, as well as generic knowledge and skills (e.g., safety competencies, the ability to measure/write/draw, prior knowledge of basic information relevant to the area of study).

3. *What Will You Know And Be Able To Do When You Finish?*

   This information must parallel and reflect the curriculum and assessment standards as defined for the module. You may find it desirable to rewrite these standards in less formal language for student use.

4. *When Should Your Work Be Done?*

   This section provides a timeline that will guide the student in planning their work. The timeline will need to reflect your program and be specific to the assignments you give your students. You may wish to include a time management chart, a list of all assignments to be completed, and instructions to the student regarding the use of a daily planner (i.e., agenda book) to organize their work.

5. *How Will Your Mark For This Module Be Determined?*

   This section will interpret the assessment criteria and conditions, assessment standards, assessment tools and suggested emphasis as defined for the module within the context of the projects/tasks completed. Accepted grading practices will then be used to determine a percentage grade for the module—a mark not less than 50% for successful completion. (**Note**: A module is


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"successfully completed" when the student can demonstrate ALL of the exit-level competencies or MLEs defined for the module.)

6. *Which Resources May You Use?*

   Resources considered appropriate for completing the module and learning activities are identified in this section of the guide. The resources may be available through the Learning Resources Distributing Centre (LRDC) and/or through other agencies. Some SLGs may reference a single resource, while others may reference a range of resources. Resources may include those identified in the Learning Resource Guide (Section I) as well as other sources of information considered appropriate.

7. *Activities/Worksheets*

   This section provides student-centred and activity-based projects and assignments that support the module learner expectations. When appropriately aligned with curriculum and assessment standards, successful completion of the projects and assignments will also indicate successful completion of the module.

**Strategies for Developing Student Learning Guides**

Prior to commencing the development of a student learning guide, teachers are advised to obtain:

- the relevant Guide to Standards and Implementation
- the student learning guide template.

Information communicated to the student in the SLG must parallel and reflect the curriculum and assessment standards as defined for the module. Therefore, critical elements of the Guide to Standards and Implementation that need to be addressed throughout the SLG include:

- module and specific learner expectations
- assessment criteria and conditions
- assessment standards
- assessment tools.

Additional ideas and activities will need to be incorporated into the student learning guide. These can be obtained by:

- reflecting on projects and assignments you have used in delivering programs in the past
- identifying human and physical resources available within the school and community
- networking and exchanging ideas (including SLGs) with other teachers
- reviewing the range of resources (e.g., print, media, software) identified in the Learning Resource Guide (Section I) for a particular module/strand.

Copyright law must also be adhered to when preparing a SLG. Further information and guidelines regarding copyright law can be obtained by referring to the:

- *Copyright Act*
- *Copyright* and the *Can Copy Agreement*.

A final task in developing a student learning guide involves validating the level of difficulty/ challenge/rigour established, and making adjustments as considered appropriate.

A template for developing student learning guides, also available on the Internet, is provided in this section (see "Student Learning Guide Template," pages J.5–10). Several sample student learning guides are also provided in this section (see "Sample Student Learning Guides," starting on page J.11.


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CAREER & TECHNOLOGY STUDIES

# SAMPLE STUDENT LEARNING GUIDE TEMPLATE


©Alberta Education, Alberta, Canada
CTS, Management and Marketing /J.5
(1997)

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## WHY TAKE THIS MODULE?

## WHAT DO YOU NEED TO KNOW BEFORE YOU START?

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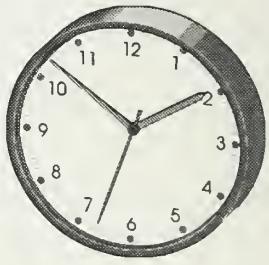
## WHAT WILL YOU KNOW AND BE ABLE TO DO WHEN YOU FINISH?

- 
- 
- 
- 
- 
- 
- 
- 

## WHEN SHOULD YOUR WORK BE DONE?





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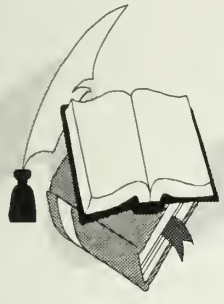
## HOW WILL YOUR MARK FOR THIS MODULE BE DETERMINED?

| | PERCENTAGE |
|---|---|
| | |

## WHICH RESOURCES MAY YOU USE?



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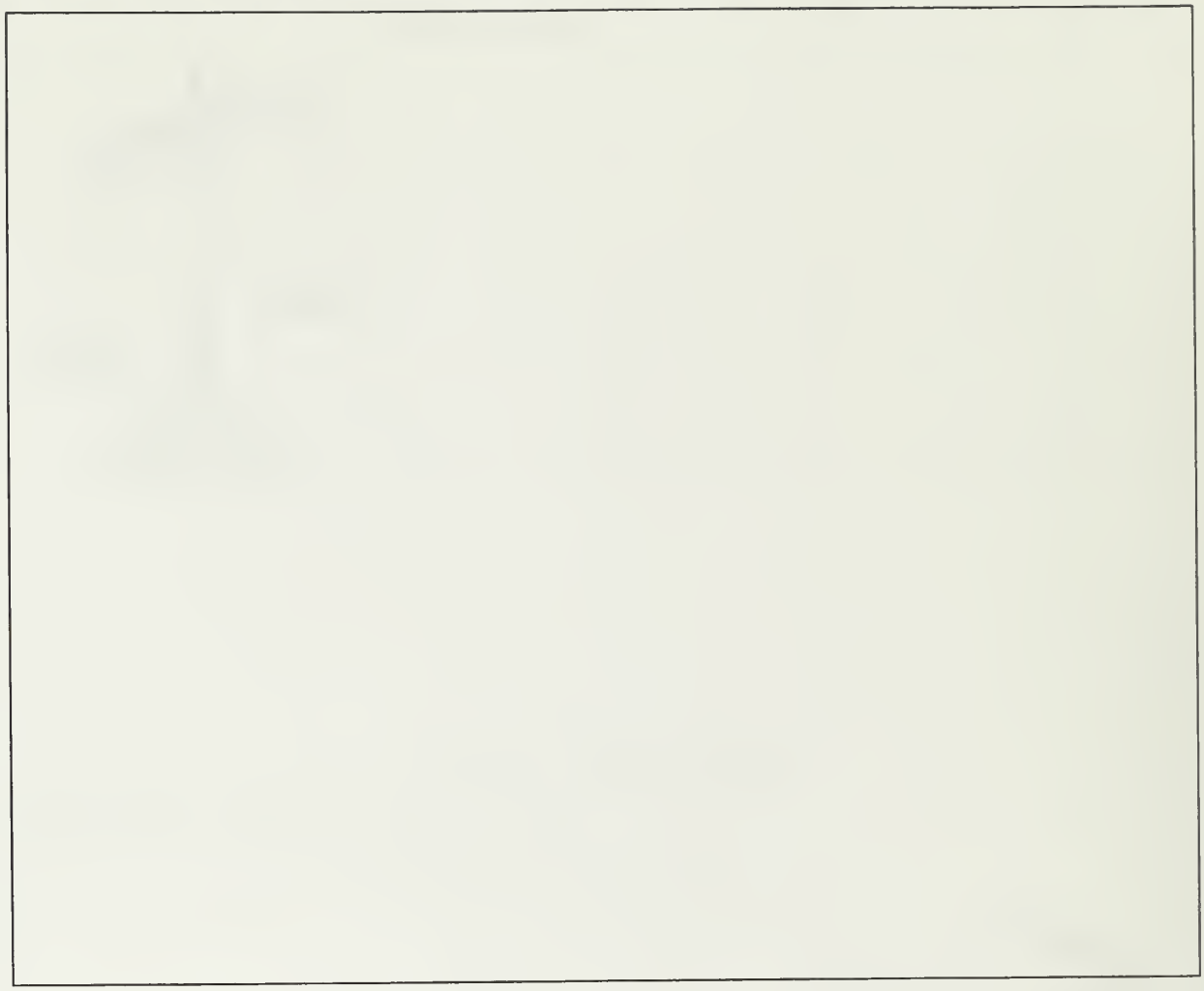
# ACTIVITIES/WORKSHEETS

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CAREER & TECHNOLOGY STUDIES

# MANAGEMENT AND MARKETING

## SAMPLE STUDENT LEARNING GUIDE

## MAM1010 Management & Marketing Basics


©Alberta Education, Alberta, Canada
Management and Marketing /J.11
(1997)

**MAM1010 Management & Marketing Basics**

## WHY TAKE THIS MODULE?

- Gain an understanding of how management and marketing concepts relate to your everyday life
- Familiarize yourself with the role of management and marketing in business
- Realize the importance of retailing in marketing
- Recognize retail merchandising strategies used by businesses to increase sales
- Appraise personal talents and interests related to careers within management and marketing.

## WHAT DO YOU NEED TO KNOW BEFORE YOU START?

There are no prerequisites identified for this module.

However, your past and current management and marketing experiences will assist you in completing this module.

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## MAM1010 Management & Marketing Basics

## WHAT WILL YOU KNOW AND BE ABLE TO DO WHEN YOU FINISH?

Upon completion of this module you will be able to:

- identify key business and marketing terms
- relate management concepts to:
  - his or her personal life
  - organizations he or she is involved in
  - different types of businesses (large and small)
- describe the characteristics of marketing and decisions made within the marketing mix
- describe the role of retailing:
  - in Canadian history
  - in Canada today
  - in Canada in the future
- identify and analyze retail merchandising strategies used in the marketplace today
- identify management and marketing careers of personal interest
- demonstrate basic competencies.

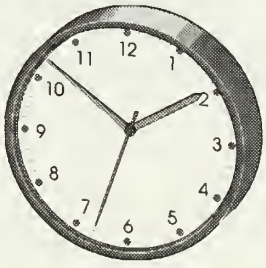
## WHEN SHOULD YOUR WORK BE DONE?

Work should be completed by _____

Use the timelines shown below to help you schedule your time. Prepare a workplan outlining when you will complete the tasks listed below. Submit this workplan to your teacher for approval. Remember, you should use your time and resources as efficiently as possible so that you can complete the module and move onto other opportunities to develop your knowledge and skills. If you find that you need to adjust your workplan; be sure to consult with your teacher.

TASK 1: 4 hours
TASK 2: 4 hours
TASK 3: 5 hours
TASK 4: 5 hours
TASK 5: 5 hours
TASK 6: 2 hours

Complete the time management planning chart included in this module.





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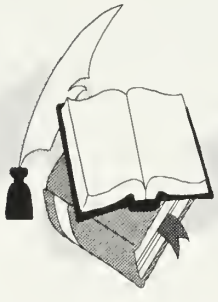
## HOW WILL YOUR MARK FOR THIS MODULE BE DETERMINED?

| | PERCENTAGE |
|---|---|
| You must first demonstrate **all** of the competencies required for this module.<br><br>When you have done this, your percentage mark for the module will be determined as follows: | |
| • TASK 1: Basic Business Activities/Concept Test (see worksheet/MAM1010–1) | 5% |
| • TASK 2: Personal Management Project (see worksheet/MAM1010–2) | 15% |
| • TASK 3: Marketing Project (see worksheet/MAM1010–3 | 20% |
| • TASK 4: Role of Retailing Presentation (see worksheet/MAM1010–4) | |
| • TASK 5: Retail Merchandising Observation Report | |
| • TASK 6: Personal Inventory of Self | |
| • demonstrate basic competencies | |

## WHICH RESOURCES MAY YOU USE?



- Stoyles, Harold. *Marketing Today: A Retail Focus.* Chapters 1–3
- Murphy, Terry. *The World of Business.* 3rd Ed. Chapters 3 and 4
- Levin, Sandy. *Marketing Dynamics.* Chapter 1
- Cranson, Lori. *Managing for Excellence.* Chapters 5 and 7
- Taller, Terry. *Marketing: A Canadian Perspective.* Chapter 1
- Stewart, Margaret. *Marketing: A Global Perspective.* Chapter 1
- *Supermarket Persuasion.* Video. Learning Seed Co.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ACTIVITIES/WORKSHEETS

**Time Management Planning Chart**

Using the chart below preplan the work that needs to be done in this module. Plan on how you will use your class time as well as extra time that you will need to complete the assignments in this module. The chart below will help you develop a five-week workplan.

**Name** _____

**Month** _____

| Monday | Tuesday | Wednesday | Thursday | Friday |
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MAM1010 Management & Marketing Basics

**Business Basics Activities** **Worksheet/MAM1010–1**

**Module Learner Expectation:** Identify key business systems and strategies used in the marketplace.

The following activities will prepare you for successful completion of a concept test related to basic business terminology and economic systems and strategies.

**Activities:**

→ Resource: *The World of Business*, Chapter 1. Complete activities 1 and 2 or 3 and 4.

1. Review and respond to the expectations of Chapter 1 – Business and You, page 14.
2. Complete the matching questions on page 29 – Building Your Business Vocabulary.
3. Review business vocabulary by completing the Business and You Crossword Puzzle.
4. Select and complete 5 out of the 10 Applying your Business Knowledge, page 30.

→ Resource: *The World of Business*, Chapter 2. Complete activities 1 and 2 or 3 and 4.

1. Review and respond to the expectations of Chapter 2, Economic Systems, page 33.
2. Complete the matching questions on page 53 – Building Your Business Vocabulary.
3. Review business vocabulary by completing the Economic Systems Crossword Puzzle.
4. Select and complete 5 out of the 10 Applying your Business Knowledge, page 54.

→ Resource: Newspapers and magazines
*The World of Business* blackline masters 39, 40, 41

- **Business Facts:** Check recent newspapers and magazines and write four current business facts. Identify the source. Use blackline master #39.
- **Environmental Alerts:** Check recent newspapers and magazines and write two current environmental alert items related to business. Identify the source. Use blackline master #40.
- **Business Survival Tactic:** Check recent newspapers and magazines and write a short summary of how a company is changing its procedures to survive or expand. Identify the source and source date. Use blackline master #41.

- **Take the concept test related to business terminology and economic systems.**


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**MAM1010 Management & Marketing Basics**

**Management Project** **Worksheet/MAM1010–2**

**Module Learner Expectation:** Relate management concepts to her or his personal life, organizations he or she is involved with and different types of businesses (large and small).

**Activities:**

- Before completing this activity you should be familiar with the roles of management in different organizations. Select at least one of the following resources to obtain the necessary background information.

  → *The World of Business* by Terry Murphy, et. al., Chapter 3 and 4.
  → *Managing for Excellence* by Lori Cranson, Chapter 5 and 7.

- Reflect upon ways you use management in your personal life. Include the ways you plan, organize, action your plans, monitor and communicate. How might you improve yourself through increasing the effectiveness of your management skills?

- Interview at least one family member and friend to find out the role management plays in his or her personal life.

- How is management used in your household?

- Identify the features of the different types of businesses:
  → sole proprietors
  → partnerships
  → corporations (conglomerates, multinationals, Crown)
  → franchises
  → cooperatives

- Interview three people involved in business. At least one should be involved in a large business (corporation), the other in a small business (proprietorship or partnership). How is the business managed? Is it effective? Why or why not? Who are the decision-makers in the business?

- **Present your reflections and interviews in your choice of format. This could be written, illustrated, video. The choice is yours!**

- **Assess your project using the Presentations/Reports Assessment Tool: Management and Marketing Project**


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**MAM1010 Management & Marketing Basics**

**Marketing Project** **Worksheet/MAM1010–3**

**Module Learner Expectation:** Describe the characteristics of marketing and decisions made within the marketing mix.

**Supplies:** popsicle sticks, dixie cups and glue. For the purpose of computing production costs for this project the following values have been assigned to the supplies:

| | |
|---|---|
| Cups | =.10 each |
| Popsicle Sticks | =.05 each |
| Glue | =.25 per unit |

**Activities:**

- Before completing this activity you should be familiar with the characteristics of marketing, the marketing mix and the types of decisions necessary to bring a product to market. Select at least one of the following resources to obtain the necessary background.
  - → *The World of Business* by Terry Murphy, et. al., Chapter 25.
  - → *Marketing Dynamics* by Sandy Levin, Chapter 1.
  - → *Marketing: A Global Perspective* by Margaret Stewart, et. al., Chapter 1.
  - → *Marketing: A Canadian Perspective* by Terry Taller, Chapter 1.
- Individually or in pairs create a prototype product that has marketable potential using the above supplies.
- Make a list of marketing decisions necessary to bring the product to the marketplace. Develop a minimum of 5 decisions for each of the 4 Ps and 2 Cs of the marketing mix.
  - ☐ Product (name)
  - ☐ Price (cost)
  - ☐ Place (where to sell it?)
  - ☐ Promotion (will you advertise?)
  - ☐ Consumer (who will buy it?)
  - ☐ Competition (who is in the marketplace already?)
- Make decisions regarding the product for the 4 Ps and 2 Cs of the marketing mix.
- Share your product and marketing decisions with a minimum of 5 potential customers.
- Make recommendations regarding the marketability of your product based on your knowledge of the marketing mix and feedback from potential customers.
- How does this activity relate to the marketing decisions made by manufacturers, wholesalers and retailer everyday?
- **Report on your decisions, customer reactions, recommendations and conclusions regarding the marketability of the product you created.**
- **Assess your project using the Presentations/Reports Assessment Tool: Management and Marketing Project**


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**MAM1010 Management & Marketing Basics**

**Role of Retailing Presentation** **Worksheet/MAM1010–4**

**Module Learner Expectation:** Describe the role of retailing in Canadian history, in Canada today and in Canada in the future.

**Activities - Individually or in groups of two or three, complete the following activities:**

- Before completing this activity you should be familiar with the role of retailing in Canada, past, present and future. Use the following resource to obtain the necessary background.

  → *Marketing Today: A Retail Focus* by Harold Stoyles, Chapters 1–3.

- Report (oral, written or visual) on the role and functions of retailing in the marketplace.
- Prepare a visual timeline that represents the evolution of retailing from its beginnings to its current role in the marketplace.
- Report on the role technology has played in the evolution of retailing.
- Make suggestions regarding the future of retailing and the role technology might play.
- **Presentation: organize all of the above activities into a presentation and present them to your teacher.**
- **Assess your work using the Presentations/Reports Assessment Tool: Management and Marketing Project**


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MAM1010 Management & Marketing Basics

**Retail Merchandising Scavenger Hunt** **Worksheet/MAM1010–5**

**Module Learner Expectation:** Identify and analyze retail merchandising strategies used in the marketplace.

**Directions: Watch the video** *Supermarket Persuasion*. **Explore popular local supermarkets** to find merchandising strategies presented in the video. Questions below help you explore local supermarkets. Questions within the boxes encourage you to make conclusions about retail merchandising strategies. Respond formally to these questions using the information you have gathered from your exploration. **Plan and complete a report and/or presentation** that presents your conclusions about retail merchandising strategies used in supermarkets.

1. Compare the price of regular popcorn kernels with that of microwave popcorn per kilogram.
2. Compare the price of instant rice with regular rice on a per kilogram basis. Estimate how much time instant rice saves over regular rice.
3. Compare the price of orange juice in a carton or jar with orange juice made from frozen concentrate. Compare prices based on an eight ounce serving.
4. Compare the price of fresh fish with frozen fish sticks on a per kilogram basis.
5. Compare the price/kilogram of the following types of potatoes (compare national brands):
   - fresh potatoes in the produce department
   - frozen french fries
   - freeze-dried instant mashed potatoes
   - potato chips

6. What pricing merchandising strategies have you discovered from all of these price comparisons?

7. Prepare a list of 15 common grocery items. Compare these prices in three different supermarkets and add up the total bill for each.
8. Identify three products offering multiple pricing. Is there a significant savings when buying more than one?
9. Find three brands of the same food in packages that appear to be the same size but contain differing amounts of food. Compare prices.
10. Find a package that appears larger than the same food in the competing brand yet contains the same amount of food or less. Compare prices.

11. What additional pricing merchandising strategies have you discovered?

12. Draw a store layout of a supermarket. Does it follow the power of the perimeter approach? Explain.
13. Explore the following supermarket departments and describe a minimum of 3 merchandising techniques used to increase sales in each department.

    ***produce, bakery, deli, meat, dairy, grocery***


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**MAM1010 Management & Marketing Basics**

14. What place merchandising strategies have you discovered?

15. Study the detergent section of a supermarket. Find out which companies are behind the brand names. Estimate what percentage of shelf space is controlled by the two leading companies.

16. Study the cereal display in a supermarket. Which companies control most of the shelf space? List the brands made by any one company.

17. Study the soft drink section in your local supermarket. Find out which companies are behind the brand names. Estimate what percentage of floor or shelf space is controlled by the two leading companies.

18. Find a package that is oversized in comparison to its contents.

19. Find a local supermarket with a high quality house brand. How do they compare in quality and price to national brands?

20. Find a local supermarket with generic foods. How do they compare in quality and price to the national brands?

21. What product merchandising strategies have you discovered?

22. Find a full page newspaper ad or flyer showing food prices. How many of the prices end in the number nine? Show the ad.

23. Walk the inner aisles of a supermarket. How many "shelf talkers" can you find? What is the most common message?

24. Find three tie-in displays in the supermarket. Describe the display. Is one item on sale, both, or neither?

25. Look for three end of aisle displays. Note the price of the items. Are they reduced or at normal price?

26. Find an example of a tumble or dump display. Is the price greatly reduced, slightly reduced, or the same as always?

27. What promotional merchandising strategies have you discovered?

28. Compare services for three different supermarkets. Compare store hours, credit available, loyalty programs, deliver, etc.

29. What service merchandising strategies have you discovered?

30. In your observations in the supermarkets, what additional merchandising strategies have you discovered?

*This worksheet has been adapted from the Supermarket Persuasion support material that comes with the video. It has been adapted to reflect metric measurements and the specific learner expectations of Module 1010 in Management and Marketing.*


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**Personal Inventory of Self** **Worksheet/MAM1010–6**

**Module Learner Expectations:** Identify management and marketing careers of personal interest.

**Activities:**

→ Resource: *Marketing Today: A Retail Focus*, 2nd Edition, Teacher's Resource, blackline master, page 221, Personal Profile Sheet.

- Complete the Personal Profile Sheet to identify personal talents, skills, interests and qualifications.

- Research and find management and marketing careers that match your personal talents, skills, interests and qualifications.

- Investigate a minimum of three careers within the management and marketing field that you would be interested in pursuing *(use Assessment Tool: MAMCARE: Career Profiles).*


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CAREER & TECHNOLOGY STUDIES

# MANAGEMENT AND MARKETING

## SAMPLE STUDENT LEARNING GUIDE

## MAM3030 Business in the Global Marketplace

Sample Student Learning Guides
©Alberta Education, Alberta, Canada
Management and Marketing /J.23
(1997)

## M&M3030 Business in the Global Marketplace

## WHY TAKE THIS MODULE?

Around the world, markets are opening up. What will Canadian business people need to know to succeed in this global marketplace and where will they find answers to their questions? In this module you will:

- explore opportunities and challenges that confront business people in establishing a global business operation in both developed and developing nations
- analyze needs and wants of consumers in potential foreign markets
- analyze existing resources, products and services that have the potential to be marketed in Canada
- evaluate and make recommendations of how businesses can work towards sustainable development for future generations.

## WHAT DO YOU NEED TO KNOW BEFORE YOU START?

There are no prerequisites identified for this module.

However, *MAM1010: Management & Marketing Basics, MAM2010: Managing For Quality* and *MAM3020: Business in the Canadian Economy* will provide helpful background knowledge to work successfully in this module.

Also, learnings in Social Studies 20 *(Quality of Life)* and Social Studies 30 *(Political and Economic Systems)* have connections to this module and provide a foundation for further learning.

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**MAM3030 Business in the Global Marketplace**

## WILL YOU KNOW AND BE ABLE TO DO WHEN YOU FINISH?

Upon completion of this module you will be able to:

- compare existing international business ventures within developing and developed nations
- identify and examine existing legislation that affects global ventures
- analyze existing global ventures
- identify and investigate global entrepreneurial opportunities within a developing and a developed nation
- demonstrate basic competencies.

## SHOULD YOUR WORK BE DONE?

Work should be completed by _____

Use the timelines shown below to help you schedule your time. Prepare a workplan outlining when you will complete the tasks listed below. Submit this workplan to your teacher for approval. Remember, you should use your time and resources as efficiently as possible so that you can complete the module and move onto other opportunities to develop your knowledge and skills. If you find that you need to adjust your workplan, be sure to consult with your teacher.

TASK 1: 4 hours
TASK 2: 4 hours
TASK 3: 5 hours
TASK 4: 12 hours

Complete the time management planning chart included in this module.

Note: Additional homework time will be required to complete this module.

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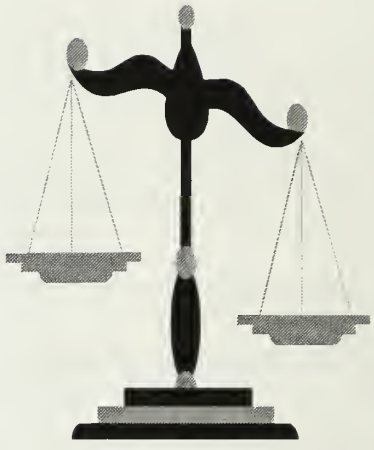
## MAM3030 Business in the Global Marketplace

HOW

| | PERCENTAGE |
|---|---|
| You must first demonstrate **all** of the competencies required for this module.<br><br>When you have done this, your percentage mark for the module will be determined as follows: | |
| • TASK 1: Activities/Concept test on basic international trade concepts including global business legislation, regulations and organizations and processes for exporting | 15% |
| • TASK 2: Research and report on a minimum of three international businesses | 15% |
| • TASK 3: Analysis of a minimum of five case studies | 20% |
| • TASK 4: Research Project on the global marketplace | 50% |
| • demonstrate basic competencies. | *Basic Competencies Reference Guide* |



WHICH

## RESOURCES MAY YOU USE?

- Steward, Margaret J. et al. *Marketing: A Global Perspective*. Chapters 15, 16, 17.
- Liepner, Michael E. and Magnan, Jane G.N. *Exploring Business: A Global Perspective*. Chapter 4.
- Stoyles, Harold. *Marketing Today: A Retail Focus.*
- *PC Globe*. Computer program.
- *International Trade Centre* in Calgary and Edmonton
- the Internet.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## MAM3030 Business in the Global Marketplace

ACTIVITIES/WORKSHEETS

### ASSIGNMENT LOG

| ACTIVITIES | DATE COMPLETED | MARK |
|---|---|---|
| **Compare existing international business ventures with both developed and developing nations** | | |
| **TASK #1:** Activity 1 – Introduction to the global marketplace | | |
| • Define terms and essay | | |
| • Visit to local retailers, 10 products | | |
| • Flowchart of 1 product from retailer | | |
| **Examine existing legislation that affects global ventures** | | |
| **TASK #1:** Activity 2 – Trade Agreements | | |
| • Summary of the 4 trade agreements | | |
| • Purpose of trade agreements, Barriers to Trade | | |
| • Concept Test | | |
| **TASK #2:** Researching the Global Marketplace | | |
| • Reference List of 10 articles | | |
| • Report w/developed nation | | |
| • Report w/developing nation | | |
| • One additional report | | |
| **TASK #3: Analyze existing global ventures – 5 Case Studies** | | |
| • Trivial Pursuit Case Study | | |
| • McDonald's in Russia Case Study | | |
| • The Body Shop Case Study | | |
| • Body Shop Visit Essay | | |
| • Canadian Entrepreneurs in Thailand | | |
| • Adjustment May be Difficult Case Study | | |
| **TASK #4: Research global entrepreneurial opportunities with both a developed and developing nation** | | |
| • Project 1 – see Global Marketplace Research and project checklist (page J.24 – J.28) | | |


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## MAM3030 Business in the Global Marketplace

### Time Management Planning Chart

Using the chart below preplan the work that needs to be done in this module. Plan on how you will use your class time as well as extra time that you will need to complete the assignments in this module. The chart below will help you develop a five-week workplan.

**Name** _____

**Month** _____

| Monday | Tuesday | Wednesday | Thursday | Friday |
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**MAM3030 Business in the Global Marketplace**

## TASK #1:
## ACTIVITY I – INTRODUCTION TO THE GLOBAL MARKETPLACE

In this activity you will become familiar with the language used in the global marketplace, and explore retailers to identify products of foreign origin in the Canadian marketplace.

***Marketing: A Global Perspective*, Chapter 15: International Marketing**

a. Define the international marketing terms on page 285.

b. With a partner, discuss the learning objectives.

c. Using these learning objectives as an outline, write an essay that includes a response to all of the objectives. (Minimum 2 pages, typed using double spacing.)

d. With a partner, edit each other's work, make corrections and hand your essay in along with your terms.

e. Visit a local retailer and find 10 products of foreign origin. In chart form record the product, price and country of origin and manufacturer's name. Choose one of the 10 products and interview the retailer to find out as much as you can about the origins of the product. Using a flow chart diagram, show how the product was able to reach the Canadian consumer. Some questions to consider when interviewing your retailer include:

1. How did it get to the retail store?
2. Who received the product in Canada?
3. How did it get to Canada?
4. Who manufactured the product?
5. What are the raw materials?
6. Where did they come from?

The retailer may not be able to answer all these questions, but he or she may be able to give you another contact. If he or she is able to give you the name of the actual importer of the product, try to contact this person for more information.


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## TASK #1
## ACTIVITY 2 – TRADE AGREEMENTS

a. Research and give a summary of the following trade legislation and trading blocs/agreements—include the advantages and disadvantages of each.

Domestic trade legislation between provinces

U.S./Canada Free Trade Agreement (FTA)

North American Free Trade Agreement (NAFTA)

European Community (EC)

Pacific-Asian Region or Pacific Rim

b. What is the purpose of countries developing formal or informal trade agreements?

c. What are the barriers to trade? Why are these barriers set up?

**Note**: Most of this information is readily available for free at the International Trade Centre.


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## TASK #2
## RESEARCHING THE GLOBAL MARKETPLACE

In this activity you will explore different businesses currently in the international scene.

Using CD-ROMS and/or Internet resources search for 10 articles about companies currently doing business in the international market. Search for the following information:

a. foreign companies doing business in Canada.

b. Canadian companies doing business abroad.

c. try to expand your search to include markets within both developed and developing worlds.

**List the articles in reference style.**

Select 3 of the articles to report on. At least one of the articles must be about doing business with a developing nation, another about a developed nation. In essay format, respond to the following information.

a. Name of Company—describe the nature of company, where is it based, is it a multinational company, international corporation, small company or private entrepreneur. How is the organization structured or organized to do business in the international setting?

b. Describe the nature of the business opportunity—what products or services are involved. Was the product changed at all to meet the needs of a new market?

c. Thinking globally, how does this business opportunity benefit Canada? How does it benefit the foreign country?

d. Were any human rights or environmental issues mentioned?


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**TASK #3 – 5 Case Studies**
**CASE STUDY 1 – TRIVIAL PURSUIT MOVES INTO THE INTERNATIONAL MARKET**

**Resource:** ***Marketing: A Global Perspective,*** **Chapter 15: International Marketing, page 301**

Will this popular board game be successful in the international marketplace? Read this case and draw your own conclusions.

a. Read the case.

b. Answer and discuss the 2 questions posed at the end of the case.

**CASE STUDY 2 – HAMBURGER DIPLOMACY**

**Resource:** ***Exploring Business: A Global Perspective*****, Chapter 4, page 80–81**

Who brought McDonald's Restaurants to Russia? Read this case to find the answer.

a. Read the case study.

b. Answer the following questions

1. What is meant by a joint venture?

2. In your opinion, what are the most difficult obstacles facing businesses that want to expand to other countries?


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**MAM3030 Business in the Global Marketplace**

## CASE STUDY 3 – THE BODY SHOP

**Resources:** **Your local Body Shop**
**Stoyles, Harold.** ***Marketing Today: A Retail Perspective,*** **page 291**

What has made the Body Shop a successful franchise internationally? This case discusses the success of Anita Rodick and her "profit with principles" practice of doing business. You will discover her principles in practice by visiting a local Body Shop franchise and observing merchandising techniques used with the store.

a. Read the case study. Answer the following questions and discuss your answers in small groups.

1. In what way is the Body Shop committed to "profits with principles"?

2. Will the Body Shop's approach to retailing become more popular in the future? Support your answer.

3. Think of a business you might own one day. How might you incorporate the concept "profit with principles" into your business?

b. Visit a local Body Shop retail outlet. Report, in essay format, on how this store projects a "profit with principles" global image. What literature and visual merchandising techniques are available in the store to support your findings?


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## CASE STUDY #4 – CANADIAN ENTREPRENEURS IN THAILAND

**Resource: *Marketing: A Global Perspective*, Chapter 16 Entering the International Market, page 304.**

How might these entrepreneurs help the people of Thailand develop economic growth, while at the same time making a profit for themselves?

Read Marketing Profile: Canadian Entrepreneurs in Thailand. While reading this case, think about the idea that developed nations have a responsibility towards developing nations to help with long-term economic growth. This case study is not only about two Canadians entering the international marketplace, but also about helping Thailand grow economically.

Answer the following questions about the above case.

a. Does this business relationship benefit the people of Thailand? Explain.

b. Are there any environmental questions that should be answered in regards to harvesting the tiger shrimp from the sea? What are the questions?

c. Would you consider this a long-term commitment to a developing nation or a short-term commitment by two entrepreneurs out to make a profit? Justify your answer in terms of economic growth for Thailand and environmental issues.


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## CASE STUDY #5 – HONDA CANADA

**Resource:** ***Marketing: A Global Perspective*****, Chapter 16 Entering the International Market, page 315.**

While reading this case think about what your life would be like if you moved to a foreign country that had a very different culture than your own. How would you feel? How would your react to a new culture?

Read the Case Study: Adjustment May Be Difficult—A case study on Japanese executives with Honda, adjusting to a Canadian lifestyle. Answer the following questions:

a. Who is responsible for the Japanese executives' happiness—Canadians, who benefit from foreign investment, or the Japanese company investing in Canada? Support your answer.

b. What could Japanese companies do to help their employees?

c. What could Canadians do to help with the situation?

d. What challenges and opportunities might you face if you were sent to work in a foreign country?


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## TASK #4

## GLOBAL MARKETPLACE RESEARCH PROJECT

In this research project you will be asked to work with a partner. Select two countries to research. One must be a developed country, the other a developing country. Each of the partners will take a country and complete the research within Section I. Work collaboratively on Sections II and III.

This report should be typed APA style or formatted formally in another style, with references being cited where appropriate. Make sure you have a table of contents at the beginning and a reference list at the end.

This report will be divided into three sections. The first is to investigate how Canadians would do business with foreign countries by researching a developed and a developing country and their people. The next section of the research will ask you to work together to compare the developing and developed countries. The last section will ask you to give recommendations and conclusions for both countries including the following information:

- opportunities for importing goods and/or services into Canada from these countries
- opportunities to export Canadian goods or services to each country
- would you do business with these countries based on bigger global issues such as the environment and human rights concerns?

### Library Resources

Box, Ben (Ed.). (1993) *South American Handbook.* Bath, England: Trade and Travel Publications.

Kurian, George Thomas (Ed.). (1992) *Encyclopedia of the Third World*, Fourth Edition. Volumes I–III. New York: Facts on File.

Kurian, George Thomas (Ed.). (1990) *Encyclopedia of the First World*, Volumes I & II. New York: Facts on File.

*Lands and People.* (1991). Volumes 1–6. Danbury, Conn: Grolier.

World Resources Institutes (Eds.). (1993 & 1994) *Environmental Almanac.* New York: Houghton Mifflin Company.

Worldmark. (1988). *Encyclopedia of the Nations.* Volumes 1–5. New York: John Wiley and Sons Inc.


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**MAM3030 Business in the Global Marketplace**

## Community Resources

### The International Trade Centre

The Business Service Centre at the trade centre is filled with free literature and a reference section of books, magazines, documents and videos. As a student, you can visit the centre when doing your research. There are tables to work at while researching and a TV/VCR for previewing videos. A few students at a time is recommended. The addresses for Calgary and Edmonton are:

International Trade Centre
Business Service Centre
11th Floor, 510–5th Street SW
Calgary, AB T2P 3S2
Telephone: 403–292–4575
Fax: 403–292–4578

International Trade Centre
Business Service Centre
540, Canada Place
9700 Jasper Avenue
Edmonton, AB T5J 4C3
Telephone: 403–495–2944
Fax: 403–495–4507

## SECTION I

**I. Basic facts about each country**

A. Geographic area—should include a map indicating where the country is located, its borders and major cities
B. Demographics of each country—population and principal cities, market size, income distribution
C. Overview of the history of each country
D. Education
E. Government and laws

**II. Economic facts about each country**

A. Economic system and membership in trading blocs and other international organizations
B. Exports, imports, chief agriculture products
C. Financial information—foreign exchange/currency, payment methods and licensing information
D. Transportation—modes available for shipping and transporting goods
E. Advertising and promotion—availability of print and electronic media


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**III. Culture of each country**

A. Language—especially the language of business people and government officials
B. Customs affecting business relations
C. Religions of the country
D. Holidays
E. Etiquette for business in the country

**IV. Travelling information for each country**

A. Travel documents and customs regulations
B. Transportation to the country and domestic travelling arrangements during your visit
C. Communications
D. Hotel Accommodations
E. Business calls and entertainment
F. Appropriate dress
G. Overall health and personal security

**V. Global issues related to each country**

A. Environmental issues concerning land, air or water
B. Human rights issues related to the workforce or discriminating policies—related to gender, race or religion

## SECTION II

**I. Comparisons between the developing and developed nation**

A. As a business person doing business with both countries, how are they similar?
B. How do they differ?

## SECTION III

**I. Import and export opportunities**

A. What are some of the potential opportunities for importing products or services into Canada from each country?
B. What are some of the potential opportunities for exporting products or services to each country?


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**MAM3030 Business in the Global Marketplace**

**II. Recommendations and Conclusions**

A. What are the advantages and disadvantages for Canadians in doing business with each of these countries.?

B. What are the advantages and disadvantages for each country in doing business with Canadians?

C. Are there any global issues that make it difficult to do business with either of these two countries? This should be a discussion on the ethical and morale responsibilities that businesses have in the global marketplace towards human rights and environmental issues. Use the concept "profit with principles."

D. What did you value the most from this global research assignment? How might knowing this information make a difference for you in the future? (Each student should reflect on his or her own feelings).


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**MAM3030 Business in the Global Marketplace**

## Global Research Project Checklist

| | Name of Student _____ | Name of Student _____ |
|---|---|---|
| Section I | Developing Country | Developed Country |
| Facts about the country | | |
| Economic Facts | | |
| Culture/Customs | | |
| Travel Information | | |
| Global Issues | | |
| Section II | | |
| Similarities | | |
| Differences | | |
| Section III | | |
| Import/Export Opportunities for each country | | |
| Advantages and Disadvantages of doing business with each country | | |
| Recommendations for doing business with each | | |
| Reflections | | |
| Format | | |
| Used APA or other formal report style | | |
| Table of Contents | | |
| Used headings to organize report | | |
| Reference list | | |

Student Reflections:


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